



CHAPTER 8

MONITORING AND EVALUATION

1. THE CHANGES OUR ACTION HAS BROUGHT TO THE SITUATION

The role of the Evaluation is to assess changes in the situation which are due to our action, to find out what could be improved and how, and so steer the group towards new adventures. Our group's actions and those of other actors have brought about changes, and thus a new situation... Because the situation changes continually, we have to keep on looking at it, doing further analysis, faith reflection and planning. The more we know about the situation and the more we analyse it, the better we can tackle it and therefore the more effective our action will be.

Thus, the Pastoral Cycle continues getting closer and closer to the VISION without ever reaching it. The PROCESS of the Pastoral Circle continues.

Pastoral action brings about transformation of the community even more than change in the context. Only when both people and communities are transformed, is the pastoral action effective. People and communities will be transformed by engaging in the struggle to establish peace and justice in the world. An important part of the Evaluation is to evaluate the process lived by the group: the learning, the experience, the consolidation of the group, the difficulties met and overcome.

'Monitoring and Evaluation' is an important step in the Pastoral Circle process. Present it in an attractive way and rotate the people gathering the data, so that many can participate in the process.

Make sure that everyone responsible for monitoring has clear and consistent guidelines and that monitoring records are completed fully and accurately. Give people collecting the information feedback on the results of their monitoring and how they are being used. Publish the results regularly to give encouragement to the members of the group/community.

The indicators will help to monitor some of the outcomes on a regular basis. Actions often produce unexpected outcomes, as well as planned changes, so it is important to collect information in a way that will show kinds of outcomes.

2. MONITORING AND EVALUATION

Monitoring means examining regularly whether we are doing the tasks according to the plan or not. It is about systematically collecting information that will help with the evaluation. At the same time, monitoring is an encouragement for those participating in the transformation, as it allows them to see progress in the tasks that are being done. It is important to keep good records, both for regular up-dates and for use when evaluating later on and to specify how regularly this information is to be collected, e.g. daily, monthly or quarterly.

Evaluation helps us see if outcomes of what we have been doing correspond to our objectives and goals and are effective. It will guide changes and improvements for the future. If we have not achieved our objectives, evaluation will help us know why, and what we need to do to overcome the problems or constraints. This could mean adjusting certain tasks and objectives. Everybody in the group/community can participate in monitoring and evaluation, but there needs to be someone responsible for it.



3. STEPS IN MONITORING

	Steps	Monitoring	Evaluation
1	Understand project details	Examine the details of the work plan and see: What tasks are to be done. Where the tasks are taking place. When the tasks begin and end. Who will do them. How they were done.	Study project activities
2	Identify monitoring and evaluation methods	On-site observation, interview, discussions, and/or self-report by the people concerned	Observation, interview, discussion, and/or self-report by the people concerned
3	Produce evaluation instrument and materials.	Can be in the form of observation checklist, questionnaire, interviews, etc.	Can be in the form of questionnaire, interview, daily self-record, etc.
4	Make a monitoring and evaluation plan	Where and when to do the monitoring, duration, who will be involved. Have everything prepared in advance. Have the Plan of work at hand.	Identify the time frame for the evaluation
5	Undertake monitoring and evaluation	Collect data whether the activities of your plan have been successful or not. If the outcomes were not totally reached search for the reasons why.	Do it as planned
6	Assess the learning and community building experienced by the group in the process of the PC.	Gather the whole community (work first in small groups) to see the learning, the difficulties, the joys, the community building, the resolution of conflicts etc.	Evaluate the process, the learning, the community building. Keep a record of it.
7	Summarize data and results of monitoring and evaluation in a report to share with others.	Summarize the outcomes and write the monitoring report.	Summarize the outcomes and report back

In monitoring as in evaluating we have to be accurate and avoid bias. That’s why the indicators are so important. Make sure the roles of the monitor and evaluator are clear and also the purposes of the monitoring and evaluation.

An important aspect of the monitoring and evaluation is the reporting back. Decide how often you will provide information on the outcomes of the actions. Make sure the message is clear for the audience. You can give written reports – quarterly, mid-year or annual newsletters or progress reports. You can also do it by oral presentation, informal discussions, radio programmes, plays, stories and role playing, etc.



3.1. Outcome Monitoring Sheet

It can simplify the task of monitoring and of collecting and working on the information later to have model sheets to record the information. Here are some examples. Give a page to each person monitoring one aspect of the whole.

Outcome: Create awareness about the lack of quality of certain medicines				
Date	Name of user	Outcome Indicators	Evidence	Staff member

Outcome: Family farmers discuss with the community re offers received to sell their land				
Date	Name of user	Outcome Indicators	Evidence	Staff member

4. EVALUATION

If Monitoring has been well done the Evaluation will be easy to do. To evaluate you need to go back to your Plan of Action.

The evaluation shows the changes that our action has brought to the situation. What have we achieved? What remains to be done? How can we improve our action? What is our impact? What worked and why? What did not work and why? What could have been done differently? What adjustments and changes are required now? Do we need a change of strategy? Evaluation supports the community's commitment to stay on track and achieve results.

Concrete information about what has been undertaken is important but so too is information about community members' perceptions of the process, the results achieved and the overall benefits of community development.

Acknowledge that risks will be taken and that most likely mistakes will be made. Evaluation enables the community to learn from these mistakes. Ensuring that this information is available means that the activity can be adapted and any risk minimised.



5. MONITORING AND EVALUATION FRAMEWORK

5.1. Monitoring our Goals

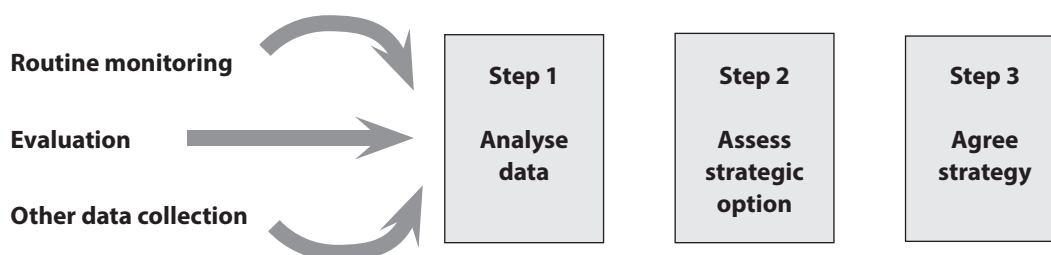
Specific GOALS	Outcomes (changes observed)	Outcome Indicators	Information collection methods	When and by whom	How to report and use
Goal 1 To increase awareness on quality of medicines	Many people try to know where the medicines come from	How many people buy medicines in pharmacies? The number of medicine sellers in the market	Questionnaire to pharmacies. Observation	Every month by group members (X, A, B...) Every month by group members (Y, Z,...)	Annual evaluation
Goal 2 Facilitate access to good quality medicines	More pharmacies sell the exact amount of medicines needed	Number of pharmacies selling part of the box of medicines	Interview and checking	Every month by group members (WW, KI, OP)	Annual evaluation
Goal 3...					

5.2. Monitoring our Objectives

Objectives	Outputs	Output indicators	Information collection methods	When and by whom	How to report and use
Objective 1 Write simple articles re the danger of medicines bought in the market	Articles written in the Parish newsletter. Articles written in the local newspaper	Number of articles written. Number of articles published. Medias publishing the articles	Collect the articles and keep track of the writer and the publication	On the date by the writer	At the monthly meeting to encourage others to do the same, and at an annual evaluation
Objective 2					

5.3. Steps in Strategic Planning

Once we have the data we need to analyse it, to assess the strategic options and to agree on the future strategy.





Effective monitoring and evaluation will help your group/community to work towards transformation and justice. It will also help to embody integrity, credibility and accountability of the group and its members and facilitate effectiveness and efficiency, and above all, ensure that the work you do will make a real difference.

6. THE FIVE PILLARS OF EVALUATION

The Objectives: the evaluation is an opportunity to re-state the original objectives of the project and to measure the changes that have occurred.

What were you expecting to achieve through this project? Were your goals met? Why is there a discrepancy? Was this discrepancy anticipated? Was there a possibility of reducing it? How do you want to re-define your action now?

The Means: assess the human and material means that were used to reach your goals. Look at the use of available resources (accountability) and future needs (forecast). This can help you to do a budget to develop the activities. It can be the moment to ask for contributions from the community, the congregation, the parish, the members, etc.

What is the relationship between the goals and the means? Are you using all the means? What are the difficulties due to the lack of means? What are the resources you will need for the future? Where should you invest more resources to make the project easier and to increase its efficiency?

The Results: what have you learned from doing this? How did you communicate the results? To whom? What impact did it have on the society? On those directly concerned? On others? What has happened to the group/community because of the process followed? What were the reactions of the media? Has the milieu developed a greater sensitivity to issues of Justice and Peace and is it more humane as a result? What has really been accomplished? What has this changed in your environment and in your neighbourhood?

The Relationship with the Gospel: sometimes there are no direct links between our concrete achievements and the Gospel. However, it is important to see how the Faith reflection has guided us during our journey towards transformation. What Gospel values are accentuated? What signs of hope does the project present?

The Future Phases: the evaluation report will present elements allowing us to overcome the weak points and to consolidate the strong points of the project. Favour the elements that appear to be the most appropriate, but do not do it too hastily or too slowly... What can you do to be more efficient? How will you go about doing this? With whom? What will be your schedule? What procedures will you use?

This is also an invitation to review the strategies implemented in the different aspects of the project, the communications, the management of resources, the pedagogy used to create awareness and the types of interventions. The review needs to be open and inclusive. It is an ideal time to celebrate successes and accomplishments, as well as to make adjustments and changes.

The group/community plan must adapt to take into account major changes that occur within the community. An annual review of the plan brings communities and organisations together to reinforce the vision they have for the community and to see how well all the pieces are fitting together.



7. EVALUATION SHEET

You may like to produce a list from the following questions that will allow you to see the changes in the situation and the learning process of the group.

7.1 About the Achievements

What has been achieved over the last year (or chosen time period)?

Are we closing the gap between where we were when we developed our plan of action and where we want to be?

What changes have occurred in the last year (impact), and how has our community/group plan effectively respond to them?

What remains to be done? How can we improve our action?

What are the strengths we should continue to build upon?

What are the challenges to which we need to respond?

Are our goals and objectives still meaningful?

Are there new actions we should take to reach our vision and goals?

What are the questions for which answers must be sought?

What additional skills and resources do we need to be effective?

What strategies should we use?

How could we involve more people? Who (else) should be contacted in the community?

7.1.1. About the Process

People and communities are transformed by their engagement in the struggle to establish peace and justice in the world. As mentioned earlier, Pastoral Action is as much about community transformation as situational change. Only when both individuals and communities are transformed and adopt a 'justice is possible' mentality, can their chosen action be effective.

Some questions worth asking while evaluating the process:

What have I learned during the process?

What have we learned as a group?

What should we be doing about community development?

What skills or knowledge do I, or the group, need to implement the project towards transformation more effectively?

What should be my/our next steps?

What will be done to maintain commitment and motivation?

8. THANKS TO ALL THOSE PARTICIPATING IN THE PROCESS

The time of doing and presenting the evaluation results is an appropriate moment to celebrate success, to thank all involved and to invite new people and organisations, thereby expanding your energy pool and sharing the load. It is a time to create opportunities for individuals and organisations to recommit; for leaders and activists to take a break or take on a new role within the process.

To maintain motivation, avoid relying on the same small group of individuals each time. They may burn out and no longer be able or willing to make a contribution. New blood brings fresh energy and motivation.

Equally important is enabling individuals or organizations to change roles or take a break from the process. This allows them to renew their commitment and contribute as their personal circumstances permits.

When the group/community feels ownership and is committed to a course of action the result will be a change in the situation and a greater commitment of individuals and the community.