CCVS
Support for community & voluntary groups

huntsforum Of Voluntary Organisations

Collecting and managing monitoring information

Finding ways to collect information is a key part of monitoring and evaluation. Tools for collecting data can be grouped under four basic headings:

- Surveys and questionnaires
- Observation
- Interviews
- keeping records and notes.

Questions to ask when choosing information collection methods

Before deciding on data collection methods, you should address a number of questions, for example:

- What depth and type of information do you want?
- Who will you need to collect it from?
- How can you check the reliability of your information?
- Will it be credible with your funder?
- How much time can you afford to spend?
- How much will it cost?
- How will you analyse the information?

Managing your monitoring information

Always bear in mind how you want to use the information before you start to collect it. This will influence what you collect, how you collect it, and how you store and process it. Make sure that everyone involved in collecting the information is using the monitoring tools in the same way, so that the information is consistent and there are no gaps.

If you don't resolve practical issues concerning how you manage your information, this can hold you back in terms of reporting and using monitoring information to feed back into organisational improvement and management.

Tools for collecting monitoring data

It is important to identify at least one tool for each out or outcome indicator. It is also important to look at how the data collected by each method relates to data collected by other methods.

Keeping records and notes and other Documentation (Often referred to as baseline information or data)

- Membership data, attendance sheets,
- Event/activity/training evaluation sheets
- These most often give you outputs data

Questionnaires, surveys, checklists:

- Questionnaires are a good way of getting responses from a large number of clients or members relatively quickly and easily

Observation

- Observation is about watching how people behave and make notes. Sometimes this can be more accurate than recording how people think they behave. Done properly, this is a formal process, often involving measuring against a scale.

Interviews

- Interviews involve going through a series of questions or topics with someone. They can be a good way of looking at difficult issues, especially with people who are not able, or do not want, to write things down.
- Interviews can be formal or informal.

- Using pictures and images can help communication and encourage people to take part.

Focus groups

- Focus groups are often a 'one off' meeting of a small group of clients, members or staff, brought together to discuss a particular topic.
- They are facilitated by a moderator who structures the discussion and takes notes.
- They are interactive and involve often open ended discussion which is different from the more structured interview.

Case studies

- Case studies allow you to examine a particular individual, event or activity in greater detail. This approach may be particularly appropriate when evaluating certain types of projects or for certain audiences.

Good practice for collecting information

1. Keep it simple. You are more likely to succeed by starting with a simple system, and making it more complex later, if necessary. Try to collect information that is easy to bring together and analyse. Make sure you do not collect any more information than you need to.

2. Consider sampling. You may not be able to collect information on all of your clients. You could collect information on a smaller number of people – a sample. The most common form of sampling is random sampling. Make a list of all your clients, perhaps alphabetically, so that everyone has an equal chance of being chosen. Then choose, for example, every tenth name on the list. This is your sample.

3. Use one monitoring system. There is no point in having two outcome-monitoring systems. Make sure that one system gives you the information that your project and your funders need.

4. Consider timing. Collect information so that it fits into your planning timetables, but remember that some outcomes may take time to achieve.

5. Test your methods. Once you have designed a questionnaire, try it out for a short period to make sure it works, changing it if necessary.

6. Be honest with clients/members. Most people are happy to give personal information if you explain clearly and honestly what the information is for and how you will use it. Some even enjoy the chance to tell their story. However, information should always be given voluntarily.

7. Reassure clients. Collecting information more than once means that you cannot collect information anonymously. However, reassure people that you will keep the information secure and that they will not be identified in any report or other public documents.

Tips for Effective Record keeping

- **Look for the most 'natural' time and place to collect the information you need.** This will be as close as possible to the source of the information. For example, information on the number of people who attend a workshop would most naturally be collected during the workshop itself and not the next day based on the memory of the facilitator.

- **Make sure that everyone who is collecting the information understands what the information is used for.** If people understand why they are collecting information they are more likely to collect it properly.

- **Give feedback on the results** to the people who have been collecting the information.

- Make sure that everyone who is collecting the information has been given **clear and consistent guidelines** on how to go about it.

- **Write down what forms are used, when and how they should be filled in, and what the information is used for.** This means that knowledge does not get lost in one person's head.

- **Store your information safely.**

- **Check that you are not collecting the same piece of information more than once.**

Resources

Assessing booklet
http://www.ces-vol.org.uk/Resources/CharitiesEvaluationServices/Documents/assessingchange-740-748.pdf

Your Project and its outcomes
http://www.biglotteryfund.org.uk/project_outcomes.pdf

Involving People – A Practical Guide
http://www.vawcvs.org/downloads/practical-guidepdf

Evaluation Resource Pack
http://www.phf.org.uk/downloaddoc.asp?id=243

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