



Facilitating intergenerational solidarity and learning through building friendships between youngsters and elderly

Module I

3. Monitoring and evaluation of the befriending service



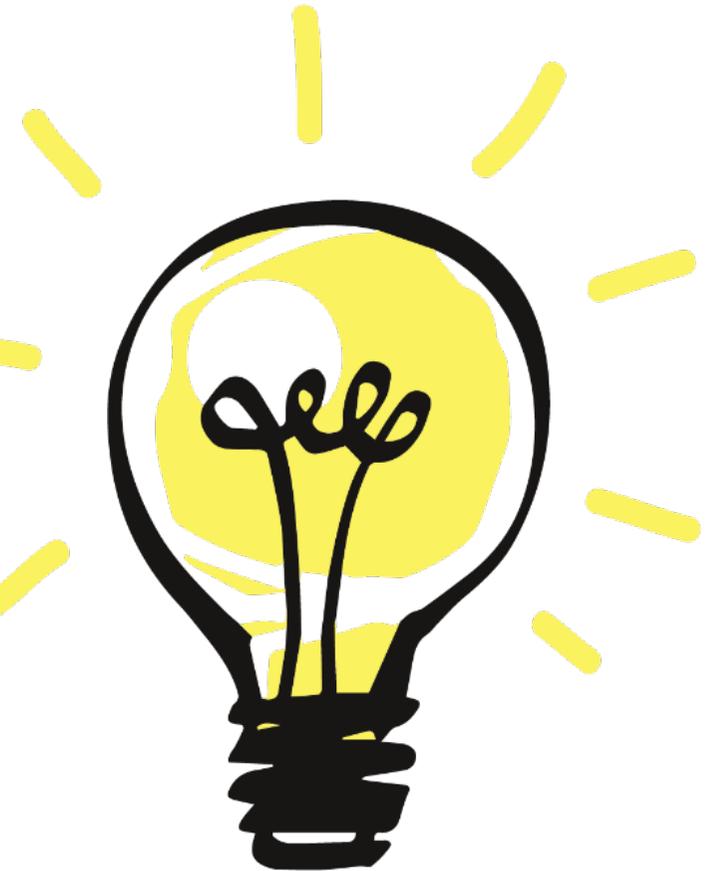
Co-funded by
the European Union

This project has been funded with support from the European commission. This publication reflects the views of the author, and the Commission cannot be held responsible for any use which may be made of the information therein.

Project number:

2021-1-PL01-KA220-YOU-000028897

1. Understand the definition, similarities and differences between terms “monitoring” and “evaluation” (M&E)
2. Get to know the practical use of M&E to improve the befriending service
3. Learn what is a M&E system and how to develop it for the assessment of the befriending service
4. Learn about tools and practices that can ensure the implementation of quality befriending service



DEFINING THE TERMS “MONITORING” AND “EVALUATION” AND THE IMPORTANCE OF THESE PROCESSES (1/4)

Monitoring and Evaluation (M&E)

- A process of continual gathering of information and assessment of it in order to determine whether progress is being made towards pre-specified goals and objectives, and to highlight whether there are any unintended (positive or negative) effects from a project and its activities.
- It is a key element to assure a good management of any programme, service or project – in our case for the implementation of a befriending service.



Tab 1

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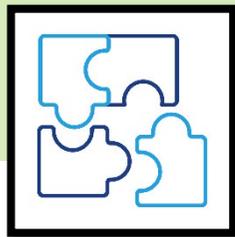
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DEFINING THE TERMS “MONITORING” AND “EVALUATION” AND THE IMPORTANCE OF THESE PROCESSES (2/4)

Monitoring is the continuous collection of data on specified indicators to assess the implementation of the befriending service in relation to activity schedules, their progress and achievements in relation to its objectives. Monitoring means routinely gather information, it is a descriptive process.

- It provides the information needed to assess the current service situation (*Is the befriending service working correctly?*)
- It allows the assessment of the project's location in relation to the specified targets and objectives, facilitating the measurement of progresses (*Are we getting closed to our objective through the implementation of the befriending service?*)
- It supports the identification of trends and patterns (*Is there any trend to take into account to improve the service?*)



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DEFINING THE TERMS “MONITORING” AND “EVALUATION” AND THE IMPORTANCE OF THESE PROCESSES (3/4)

Evaluation is the periodic assessment of the design, implementation, outcomes and impact of the befriending service. It should assess the relevance and achievement of objectives, implementation performance in terms of effectiveness and efficiency, and the impact of the service in the community. This is an analytical process.

- It gives information about why the project is or is not achieving its targets and objectives.
- Depending on the purpose of a particular evaluation, it might assess areas such as: achievement of intended goals, cost-efficiency, effectiveness, impact and / or sustainability.
- Addresses: ‘why’ questions - what caused the changes being monitored; ‘how’ questions - what was the sequence or process that led to successful (or unsuccessful) outcomes; and ‘compliance and accountability’ questions - did the promised activities actually take place and as planned?



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DEFINING THE TERMS “MONITORING” AND “EVALUATION” AND THE IMPORTANCE OF THESE PROCESSES (4/4)

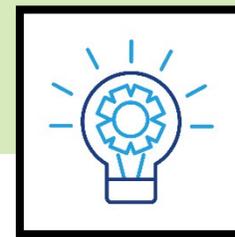
Why monitoring and evaluation are important when implementing a befriending service?

Monitoring:

- Provides the organization/informal group of youngsters running the service with regular information on progress relative to targets and outcomes.
- Identifies actual or potential successes and problems at the early stage.
- Enables to adjust the service taking into account the experience and feedback of the people involved in it.

Evaluation:

- Seeks to establish causality for the situations and trends recorded by monitoring.
- The evaluation results can be used to make adjustments to the design and implementation of the service.



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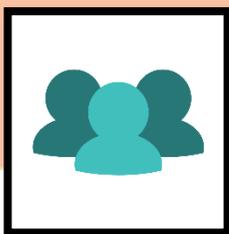
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Actors involved in the Monitoring & Evaluation process:

- Representatives of the team involved in the befriending service implementation (e.g. **mentors, supervisors**)
- The **befrienders**
- The **befriendees**

It is very important to involve befrienders and befriendees in the process because they can provide meaningful feedback about the activities implementation, sharing their perceptions about the quality of the service. Their satisfaction is very important to make the service sustainable and they will surely appreciate to be involved in this process.



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Who and how will be involved in the M&E process? (2/4)

Tools that can be used to gather data:

- **Evaluation questionnaires or face-to-face interviews**
- **Exit interviews** (this type of interviews can be held with people when their about to leave the service/to end their collaboration, typically in order to discuss their reasons for leaving and their experience with the service)
- **Focus grups** (Each person in the group is encouraged to participate in a pre-planned discussion guided by a facilitator. Group discussion canbe more stimulating and inspiring than individual interview, since it encourage the sharing of different perspectives)
- **Anonymous surveys** (Anonymous feedback allows people to express views honestly, without any fear or worry. It can be useful sometimes, but it should not be the primary source of data since the very nature of anonymity makes it difficult to engage in dialogue around the feedback and to monitor whether a situation is getting better or worse)



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Who and how will be involved in the M&E process? (3/4)

Examples of questions to ask befrienders:	Examples of questions to ask befriendees:
Are you satisfied with the activities you are participating in?	Are you satisfied with the activities you are participating in?
Are the activities meeting you expectations?	Are the activities meeting you expectations?
Are you satisfied with the training received and the knowledge gained?	Do you feel that, since the beginning of your involvement in the service, something has improved in your life?
Is the frequency of the activities you are involved in adequate for you?	Is the frequency of the activities you are involved in adequate for you?
Do you consider your roles and responsibilities adequate?	Do you feel supported by the organization/informal group running the service?
Are your ideas and opinions considered?	Would you recommend the service to other elderly people?
Is the communication with your mentor and supervisor regular and adequate?	Are you happy with your relationship with your befriender?



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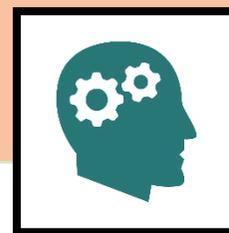
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What should be the results of the M&E process?

Albert Einstein said, *“Insanity is doing the same thing over and over again and expecting different results.”*

If we cannot remember past mistakes and avoid them, we are simply going to make the same mistakes again. Documenting **lessons learned** and **what worked well** will help ensure we do not repeat mistakes in the implementation of the befriending service. On the other hand, those things that were done right will be remembered and done again.

Finally, identify **what need to be improved** will support the identification of **priorities for the future** and the **planning of actions** to achieve the desired goals.



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What is a Monitoring & Evaluation system?

➤ In most cases an M&E system refers to all the indicators, tools and processes that you will use to measure if the befriending service has been implemented according to the plan (monitoring) and is having the desired result (evaluation).

How to create M&E system?

1. Know your program
2. Choose your indicators
3. The SMART model
4. Define how your indicators will be measured
5. Find or create the tools to measure the indicators
6. Define responsibilities, data flow and data management
7. Put everything into the M&E plan



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1. Know your program:

Before you start work on the M&E system it's important that you understand as much as possible about the program itself:

- Why has the friendship service been created?
- What are the objectives?
- How can the objectives be achieved?
- What are the activities?
- What are the expected outputs and outcomes?

WHAT

WHY

WHEN

WHO

WHERE

HOW

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2. Choose your indicators

You need to choose indicators to measure the success of the service at different levels.

- **Goals:** Overarching aims, generally not specific enough to measure.
e.g. reduce elderly loneliness and promote intergenerational solidarity
- **Objectives:** Specific achievements that contribute towards reaching the goal(s). When writing objectives you can follow the **SMART model**.
e.g. involve X young and old people in befriending services within a set deadline.
INDICATORS: No. of young people involved; No. of elderly involved; etc.
- **Outcomes:** Changes in behavior, attitudes, perceptions, knowledge, skills as a result of your project.
e.g. improved intergenerational understanding, greater openness towards intergenerational activities by both young and elderly, etc.
INDICATORS: results of surveys, focus groups carried out with the people involved in the service, etc.
- **Outputs:** Tangible deliverables from the project.
e.g. tools to be used to raise awareness: video interviews to share the feedback of the people involved in the befriending service; a pamphlet/leaflet with the main results of the initiative, etc.



What is an indicator?

Cards – Front Side

What is an indicator?

Is it possible to use standard indicators?

Are quantitative indicators more important than qualitative ones?

What are the indicators for?

Cards – Back Side

Something that you can measure accurately using either qualitative or quantitative methods, and your available resources

Yes, they are commonly used for a specific type of services. By using them you will be able to compare your results to other programs or national statistics but if a service is new in your country it might be difficult to find standard indicators.

No, they are both important. Quantitative indicators are measures of quantities or amounts. Qualitative indicators are people's judgments or perceptions about a subject.

They are used to make decisions to improve the service. There is no point in measuring an indicator if the results will not influence decisions.

3. The SMART Model

It is used to help guide goal setting. **SMART** is an acronym.

- **SPECIFIC:** The goal is direct, detailed and meaningful.
- **MEASURABLE:** The goal is quantifiable to track progress or success.
- **ATTAINABLE:** The goal is realistic and you have the tools and/or the resources to attain it.
- **RELEVANT:** The goal aligns with your service mission.
- **TIME-BASED:** The goal has a target date.

S Specific

M Mesaurable

A Attainable

R Relevant

T Time-based



4. Define how your indicators will be measured:

- Once you have chosen your indicators, you need to write a definition for each one – it describes *exactly* how the indicator is calculated. Otherwise there is a serious risk that indicators might be calculated differently at different times, which means the results can't be compared.
- Identify how the data will be collected, the frequency (monthly, quarterly, annually, etc.), which tool will be used, where it will be reported, and how quality control will be managed.
- It's good to put all this information in one table for each indicator.

AN EXAMPLE:

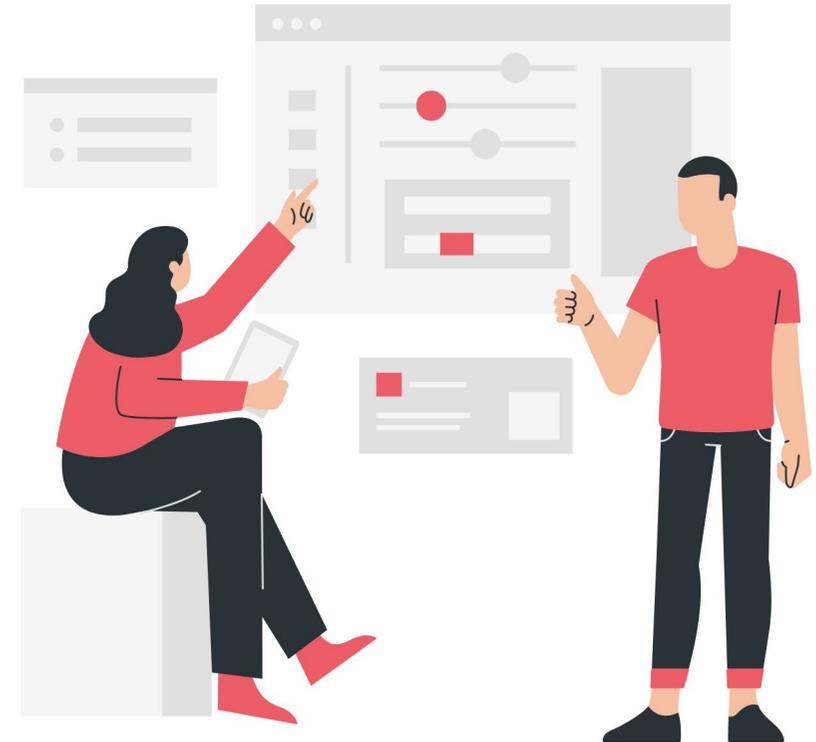
Indicator: percentage of young people involved in the befriending service since the beginning of its implementation, continuing their collaboration after 6 months.

Definition: Number of youngsters still involved in the service in month 6 (e.g. 7) divided by the number of youngsters who start their collaboration in month 1 (e.g. 10), multiplied by 100 (e.g. 70% continuity).



5. Find or create the tools to measure the indicators

- When defining your indicators you will need to identify which tools will be used to collect data on that indicator.
- Common tools include check-lists, forms and surveys.
- Wherever possible you should use or adapt existing tools that are known to work.



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6. Define responsibilities, data flow and data management:

- After creating the tool for each indicator you need to decide who will be responsible for each step in the process: who will be responsible for using the tool to collect the data, who will enter the data into the computer, who will analyse it and who will create the final report – **PEOPLE**
- You will need to consider how all the data from the indicators will be managed: where it will be stored (on a computer, in hard copy files, in a database, etc), what software will be used to analyse it, and how privacy will be maintained – **TECHNOLOGY, PROCESS**



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7. Put everything into the M&E plan:

- Once you have completed all the previous steps you need to write up everything in one document.
- This document is often called the M&E plan, but it can also be called the M&E procedures, M&E standard operating procedures (SOP), or M&E system documentation.



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Clear expectations

Make expectations clear. Inform the befriender about what to expect when taking part in this type of service.

Clear rights and duties

Elaborate a Charter of the Befrienders Rights and Responsibilities to be shared with them is important. It should include topics such as: health and safety, confidentiality, fulfilling commitments, training and certification of the voluntary activity carried out, etc.)

TOOLS and PRACTICES THAT CAN SUPPORT THE IMPLEMENTATION OF QUALITY BEFRIENDING SERVICES

Regular supervision

Agree on the frequency (weekly/monthly) and the modality (online, offline, in group or individual setting). It will be especially important to evaluate if the match befriender-befriender is working well.

Effective feedback

The befriender should receive feedback in a timely, specific, non-judgmental, balanced way (focused on good and bad sides). To do this, it will be needed for the organization to maintain a regular communication with both the befrienders and the beneficiaries.

Type the correct answers in the boxes

Find correct words that define each letter of a “SMART” objective:

When a goal is clear on what is expected and answers 3 main questions: What needs to be done? Who's responsible for achieving it? How will it be achieved?, it is called:

To know how to track progress and know when the objective has been achieved, the goal has to be:

The goal has to be realistic and so that it is possible to realize it.

The goal need to be aligned with the team and organisation's vision, it has to be:

It is important to set a timeframe to achieved the objective, which makes the goal:

ASSESSMENT

Drag the definition to the correspondent explanation.

Elements to Drag
(e.g. text boxes, images...)

Tools that can be used to carry out the M&E process

The main aim of the M&E process

People involved in the M&E process

The main difference between monitoring and evaluation

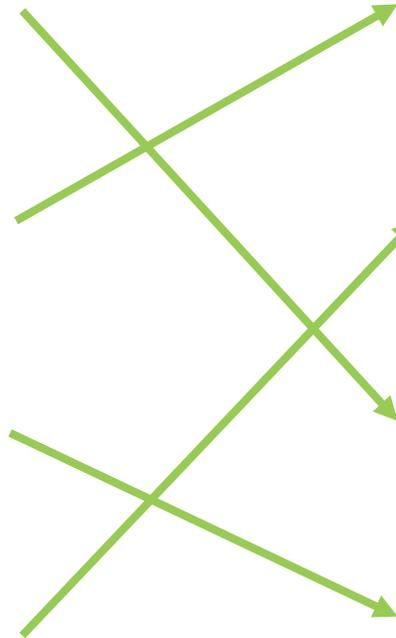
Drop positions

Identify what worked well, what did not work; document lesson learned and detect what need to be improved.

The former is a descriptive process, the latter an analytical one.

Evaluation questionnaires, exit interviews, anonymous surveys, focus groups, etc.

Befrienders, befriended, mentors, supervisors



Put words in the right arrangement

your | created | was | service | why | know | means
| know | it

Know your service means know
why it was created.

befriending | make | quality | services | clear
| implement | is | important | to |
expectations

Make expectations clear is important
to implement quality befriending
services.

your | system | choose | creating | M&E |
indicators | is | part | of | a

Choose your indicators is part of
creating a M&E system.

Note: Word limit: 10 words **Example:** <https://bit.ly/3qj16Zi>

QUESTION 1: The evaluation process can have different purposes. True or false?

Possible answer(s)	1. True 2. False
Correct answer(s)	True
Response to correct answer(s)	<p>Congratulations! Your answer is correct.</p> <p>Depending on the purpose of a particular evaluation, it might assess areas such as: achievement of intended goals, cost-efficiency, effectiveness, impact or sustainability.</p>
Response to wrong answer(s)	<p>Not quite right. The correct answer is “True” .</p> <p>Depending on the purpose of a particular evaluation, it might assess areas such as: achievement of intended goals, cost-efficiency, effectiveness, impact or sustainability.</p>

QUESTION 2: *Which of the following statements is not correct?*

Possible answer(s)	<ol style="list-style-type: none">1. Monitoring means observing something and keeping a record of it.2. Monitoring provides the information needed to assess the current service situation.3. Monitoring is an analytical process and evaluation is an observational one.
Correct answer(s)	<ol style="list-style-type: none">3. Monitoring is an analytical process and evaluation is an observational one.
Response to correct answer(s)	<p>Congratulations! Your answer is correct.</p> <p>Monitoring means observing something and keeping a record of it; it provides the information needed to assess the current service situation but it is an observational, descriptive process followed by the evaluation, which is an analytical process which assess if a progress is made in achieving expected results.</p>
Response to wrong answer(s)	<p>e.g. Not quite right. The correct answer is “3”.</p> <p>Monitoring means observing something and keeping a record of it; it provides the information needed to assess the current service situation but it is an observational, descriptive process followed by the evaluation, which is an analytical process which assess if a progress is made in achieving expected results.</p>

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