

Step 1. Identify your evaluation audience

Identify who the evaluation audience or stakeholders are. The evaluation audience include the people or organisations that require an evaluation to be conducted. There may be multiple audiences, each with their own requirements. Typically, this includes the funding agency, and may also include partner organisations, the Council (or Councillors), the project team, and the project's participants or target group. Remember that evaluation is generally undertaken for accountability, or learning, and preferably both together.

If you have limited funds for evaluation, you may have to prioritise your evaluation by identifying who are the most important people to report to.

Download M&E [Audience and Evaluation Questions Template](#)

Step 2. Define the evaluation questions

Evaluation questions should be developed up-front, and in collaboration with the primary audience(s) and other stakeholders who you intend to report to. Evaluation questions go beyond measurements to ask the higher order questions such as whether the intervention is worth it, or could it have been achieved in another way (see examples below). Overall, evaluation questions should lead to further action such as project improvement, project mainstreaming, or project redesign.

You should also identify at this stage whether the evaluation audience has specific timelines by which it requires an evaluation report. This will be a major factor in deciding what you can and cannot collect.

Broad types of evaluation questions by focus area

Type of evaluation

Evaluation question

Process

How well was the project designed and implemented (i.e. its quality)

Outcome

Did the project meet the overall needs?

Was any change significant and was it attributable to the project?

How valuable are the outcomes to the organisation, other stakeholders, and participants?

Learnings

What worked and what did not?

What were unintended consequences?

What were emergent properties?

Investment

Was the project cost effective?

Was there another alternative that may have represented a better investment?

What next

Can the project be scaled up?

Can the project be replicated elsewhere?

Is the change self-sustaining or does it require continued intervention?

Theory of change

Does the project have a theory of change?

Is the theory of change reflected in the program logic?

How can the program logic inform the research questions?

Source: [Davidson & Wehipeihana \(2010\)](#)

Another way of classifying broad evaluation questions is presented below.

Focus of the Evaluation

Evaluation question

Relevance

Does the workshop topic and contents meet the information needs of the target group?

To what extent is the intervention goal in line with the needs and priorities of the community?

Efficiency

Did the engagement method used in this project lead to similar numbers of participants as previous or

Have the more expensive engagement approaches led to better results than the less expensive engag

Effectiveness

To what extent did the workshops lead to increased community support for action to tackle climate ch

To what extent was did the engagement method encourage the target group to take part in the projec

Outcome

To what extent has the project led to more sustainable behaviours in the target group?

Were there any other unintended positive or negative outcomes from the project?

Sustainability

To what extent has the project led to the long-term behaviour change?

Source: [Europe Aid Cooperation Office](#)

Step 3. Identify the monitoring questions

In order to answer evaluation questions, monitoring questions must be developed that will inform what data will be collected through the monitoring process. Monitoring questions are quite specific in what they ask, compared to evaluation questions. For example, for an evaluation question of "What worked and what did not?" you may have several specific questions such as "Did the workshops lead to increased knowledge on energy efficiency in the home?" or "Did participants install water efficient showerheads".

The monitoring questions will ideally be answered through the collection of quantitative and qualitative data. It is important to not leap straight into the collection of data, without thinking about the evaluation questions. Jumping straight in may lead to collecting data that provides no useful information, which is a waste of time and money.

Download the M&E Plan Template to input the information.

If you have developed a program logic, you can use this to start identifying relevant monitoring questions and indicators. Click here to see how. (LINK TO PPT IDENTIFYING MONITORING QUESTIONS FROM PROGRAM LOGIC)

Once you have identified monitoring question in your program logic, you can transfer them into your M&E Plan Template. Click here to see how. (LINK TO PPT FROM PROGRAM LOGIC TO M&E)

Step 4. Identify the indicators and data sources

The next step is to identify what information you need to answer your monitoring questions (indicators) and where this information will come from (data sources). Data sources could be participant themselves, or people's homes (eg. audit of lighting types) or metering, or even literature. You can then decide on the most appropriate method to collect the data from the data source.

The "evaluation method selector" is there to assist you in selecting an appropriate method for your needs.

Step 5. Identify who is responsible for data collection and timelines

It is advisable to assign responsibility for the data collection so that everyone is clear of their roles and responsibilities. This also allows new staff to come onto the project and get a sense of who is responsible for what, and what they may have to take on and when.

Collection of monitoring data may occur regularly over short intervals, or less regularly, such as half-yearly or annually. Again, assigning timelines limits the excuse of 'not knowing'.

You may also want to note any requirements that are needed to collect the data (staff, budget etc). It is advisable to have some idea of the cost associated with monitoring, as you may have great ideas to collect a lot of information, only to find out that you cannot afford it all. In such a case, you will have to either prioritise or find some money elsewhere (sorry but we have no special tool for that).

Step 6. Identify who will evaluate the data, how it will be reported, and when

This step is optional but highly recommended, as it will round off the M&E plan as a complete document. Remembering that evaluation is the subjective assessment of a project's worth, it is important to identify who will be making this 'subjective assessment'. In most cases, it will be the project team, but in some cases, you may involve other stakeholders including the target group or participants. You may also consider outsourcing a particular part of the evaluation to an external or independent party.

For an evaluation to be used (and therefore useful) it is important to present the findings in a format that is appropriate to the audience. This may mean a short report, or a memo, or even a poster or newsletter. As such, it is recommended that you consider how you will present your evaluation from the start, so that you can tailor the way to present your findings to the presentation format (such as graphs, tables, text, images).

Step 7. Review the M&E plan

Once you have completed your M&E plan, highlight data sources that appear frequently. For example, you may be able to develop surveys that fulfil the data collection requirements for many questions.

Also consider re-ordering the M&E plan in several ways, for example, by data source, or by data collection timeframe. Finally, go through this checklist. Does your M&E plan:

- Focus on the key evaluation questions and the evaluation audience?
- Capture all that you need to know in order to make a meaningful evaluation of the project?

- Only asks relevant monitoring questions and avoids the collection of unnecessary data?
- Know how data will be analysed, used and reported?
- Work within your budget and other resources?
- Identify the skills required to conduct the data collection and analysis?