

## INTRODUCTION

## WORKSHOP 7 MONITOR, EVALUATE AND UPDATE

<b>CONTENTS</b>	<b>OBJECTIVES:</b>
<p><b>Pre Workshop Planning:</b> Overview</p> <p><b>Background Information</b></p> <p><b>Workshop Presentation:</b> Proposed Workshop Guide</p> <p><b>Pre Workshop Planning:</b> Workshop Preparation Workbook Sample Agenda</p> <p><b>Handouts</b></p>	<ol style="list-style-type: none"><li>1. Discuss the importance of indicators and learn to identify them</li><li>2. Present concept and importance of Monitoring, Evaluating and Updating</li></ol>

### MATERIALS AND SUPPLIES FOR THIS WORKSHOP:

#### MATERIALS:

- ▶ Sign in sheet
- ▶ Sample Agenda
- ▶ Calender
- ▶ Certificates of Completion
- ▶ Handout 1: OUTCOMES AND INDICATORS
- ▶ Handout 2: MONTHLY PROGRESS SHEET
- ▶ Handout 3: EVALUATION OF PROGRESS
- ▶ Handout 4: POST-WORKSHOP SURVEY
- ▶ Compiled Results of Workshop 6

#### SUPPLIES:

- ▶ Easel pad
- ▶ Easel pad stand
- ▶ Tape
- ▶ Markers
- ▶ Pens/Pencils
- ▶ Food items/Drinks
- ▶ Writing Pad
- ▶ Camera

## OVERVIEW:

In Workshop 7, the group is introduced to the concept and importance of indicators. They are also introduced to the steps of Monitoring, Evaluating and Updating their plan/project.

- \* It is necessary to have *indicators* to see if positive changes have occurred as the result of your efforts. Indicators can be used in the evaluating process.
- \* It is very important to *monitor* what steps you have taken, what steps you are taking at the present and what steps are left to be taken to complete a plan. From time to time you should make sure that the taken steps have been effective. Monitoring your plan will also allow you to determine if all the role players have been keeping on top of their tasks.
- \* *Evaluating* your project/plan is another important component to the implementation of the action plan. The key is to figure out the progress made and what the group could do to be more successful.
- \* After monitoring and evaluating your progress, it might be necessary to *update* your plan to better meet your needs to accomplishing your outcome. Updating your plan will allow you to add more efficient ways of accomplishing certain tasks and will take away steps that have been found to be ineffective.

**WORKSHOP 7  
MONITOR, EVALUATE  
AND UPDATE**

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## **7.1 INDICATORS**

### ***A. What are indicators and why are they important?***

- \* They allow for a direct way of measuring progress towards outcomes
  - \* They are compared to the baseline you have set as a beginning point to see if we are improving, declining or remaining the same
- Ex: Outcome: By year -- we'll have 10 new home owners in our area  
Baseline: There are 50 homeowners in our area/neighborhood  
Indicator: 1. Number of houses that get sold  
2. Number of people that show interest in buying houses in our area (Ex. at real estate companies)

### ***B. Through what sources can you identify indicators?***

- \* Surveys
- \* Agency records
- \* Analysis of existing data
- \* Focus groups
- \* Individual interviews
- \* Group interviews
- \* Participant observation

### ***C. Factors that influence what indicator you will choose***

- \* Kinds of data that are available
- \* Timeline for measurement (Short vs. Long)
- \* Availability of baseline data for making comparison
- \* Amount of information needed

### ***D. How do you create indicators?***

1. Get a team together
2. Clarify your purpose
3. Identify your outcome
4. Research existing models, indicators and data
5. Make a list of possible indicators
6. Select the indicator
7. Evaluate impact of your efforts
8. Research the data
9. Present the report as needed
10. Update the report regularly

## 7.2 MONITORING

### *A. What is monitoring?*

- \* Checking on what is done and seeing what is left to be done  
(This can be included in your agenda at your association's meetings.)

### *B. Why is monitoring important?*

- \* To see the progress of each group in towards components of action plan
- \* To find out which groups need help in implementing their plan

## 7.3 EVALUATING

### *A. What is evaluating?*

- \* Assessing your progress and making the necessary changes to be more productive in reaching your desired outcome.

Note: The frequency of evaluation depends on how complex your plan is and how the progress has been in reaching wanted results

### *B. Why is evaluating important?*

- \* So we'll be more clear in our steps to accomplish our tasks
- \* See how effective efforts have been
- \* To help us stay focused
- \* To let others know about our challenges
- \* To share effective and ineffective strategies with each other
- \* To use our time and efforts in a more effective way
- \* To have documentation for when a funding opportunity comes along
- \* To help us question each other and help each other
- \* To push us to identify indicators for our outcomes and other components of the action plan and measure the indicators to see our progress

***C. Two types of evaluations  
(Both can be used in conducting the same evaluation)***

***1. Quantitative - Asks questions based on data and or accomplishment***

**Examples:**

- \* Did you accomplish your goal of ----?
- \* Was the timeline met?
- \* How many outcomes/objectives were met?
- \* Were there any changes done to the implementation process?
- \* Others?

**Possible ways to collect data:**

- \* Surveys
- \* Official records (information collected by agencies/institutions)

***2. Qualitative - Asks questions linked to opinions and feelings***

**Examples:**

- \* How do you feel about the process so far?
- \* Are the timelines realistic?
- \* Do you think your progress is too slow?
- \* Do you think changes need to be made to the action plan?
- \* Do you think the priorities need to be changed?
- \* Is there enough teamwork?
- \* Do you have any recommendations for the future?
- \* Others?

**Possible ways to collect data:**

- \* Focus groups
- \* Questionnaire
- \* Direct observation (use if the existing data is not accurate or no previous or current data exists)
- \* Program records
- \* Interviews - Individual/group

***D. Two strategies in doing evaluations  
(Both strategies can be used in the same evaluation)***

***1. Outcome-based evaluation***

- \* Focuses on the changes that have taken place in lives of individuals, families, community members and the neighborhood association
- \* Focuses on the differences made in the community as a result of implementing the action plan

***2. Result-based evaluation***

- \* Report on completed activities and the progress made towards the components of the action plan
- \* Check off outcomes/goals/objectives as they are completed

***E. Suggested steps to designing an evaluation***

**1. Make an outline of the format you would like for your evaluation**

- \* History of the project
- \* Overview of the project
- \* Evaluation of external team
- \* Summary of major accomplishments
- \* Any changes made to the original action plan
- \* Compare achievements to the action plan components
- \* Evaluation of internal team (should be confidential)
- \* List of issues and tasks that need more investigation
- \* Recommendations for future projects of this type
- \* Description of ongoing project related activities that will require further team member participation (if any)

**2. Select an evaluation type (Quantitative/Qualitative) and strategy type (outcome-based evaluation/Report on progress and task completions)**

**3. Think of ways you can collect quantitative and or qualitative data (survey/focus group/interview/observation/case record/questionnaire)**

**4. Collect data**

**5. Analyze data**

**6. Review and incorporate results**

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***F. Things to keep in mind while doing evaluations***

- \* Ask questions, research, answer them and then make decisions based on those answers
  - Question samples:
    - \* What are we aiming to achieve? (Outcome/goal/etc.)
    - \* Did we achieve our desired results? If yes, to what degree?
    - \* What problems did we come across?
    - \* Which steps were successful?
    - \* How can we apply what we have learned in the future?
- \* Do evaluations on an ***ongoing*** basis for continuous improvement
- \* ***Everyone's input*** is important and it should be encouraged
  - \* Internal team - Core team (Ex. Board members of a neighborhood association)
  - \* External team - Ones involved in the designing, planning and or implementing of the plan
- \* During evaluation, members should feel free to examine why something succeeded or failed
- \* Evaluation should take in account the ***efforts*** that are put in and the ***results*** that are gotten due to the efforts
- \* Meet with organizations that share ***similar interest*** with you and who have already conducted an evaluation or are in process of conducting it in order to share evaluation techniques and findings with them
- \* Focus more on progress of outcomes than on evaluating the people
- \* Report successes and failures

***G. What can you learn from your completed evaluation?***

- \* What works (effective)
- \* What does not work (not effective)
- \* Evidence of impact
- \* Ways to improve

NOTE: Don't forget to reward people for acknowledging their difficulties and learning from them.

## **7.4 UPDATING**

### ***A. What is updating?***

- \* It is making the necessary changes to your plan to make it more efficient in reaching the results that you are aiming for
- \* Updating can be done anywhere along the process as long as the group is able to make the decision. It is important to keep the consensus that has been built during the Workshop series.

### ***B. How can you use the results of the evaluation to update your plan?***

- \* You now know what methods have been effective/ineffective
- \* You now have a better idea of what your progress is. Make the necessary changes to your plan to meet your desired progress
- \* Look at your timelines and based on your progress, make changes to make the timelines more realistic as needed

### ***C. What should you consider when updating your plan?***

- \* Reasons for the change
- \* If the change will affect the eventual outcome of the project/plan
- \* If the change will increase risk for failure. (Although sometimes taking a risk might be your only chance to reach your outcome.)
- \* If the change forces the project/plan over budget and beyond your timelines, see if it is possible to cut any of the specific tasks or objectives

**Change is not necessarily a negative word;  
many changes are made to obtain positive and or better results**

**PROPOSED WORKSHOP GUIDE**

<b>Time</b>	<b>Activity</b>	<b>Presentation</b>	<b>Materials Needed</b>
2 MIN	Agenda	<b>Introduce</b> the Agenda <b>Ask</b> the participants if they want to make any changes or additions	* Agenda
5 MIN	Objectives	<b>Present</b> the objectives of the workshop	* Objectives written on easel pad
5 MIN	Review	<b>Distribute</b> compiled results from Workshop 6	* Compiled results from Workshop 6
10 MIN	Report on tasks	<b>Ask</b> the participants to report on their assigned tasks	* Snacks/ Drinks
10 MIN	Present	<b>Present</b> the concept of indicators (See Background Information 7.1) <b>Distribute</b> Handout 1	* Handout 1
10 MIN	Exercise	<b>Present</b> on the easel pad an outcome off of the action plan <b>Ask</b> the participants to think silently by themselves and to come up with an indicator for the outcome <b>Record</b> the responses	* Outcome written on the easel pad * Markers
15 MIN	Present	<b>Present</b> the concept and importance of <b>MONITORING</b> , <b>EVALUATING</b> and <b>UPDATING</b> the action plan (See Background Information 7.2, 7.3, 7.4) <b>Distribute</b> Handout 2	* Handout 2

**WORKSHOP  
PRESENTATION**

**WORKSHOP 7  
MONITOR, EVALUATE  
AND UPDATE**

**PROPOSED WORKSHOP GUIDE CONT.**

<b>Time</b>	<b>Activity</b>	<b>Presentation</b>	<b>Materials Needed</b>
5 MIN	Present	<b>Present</b> importance of recording your monthly progress <b>Distribute</b> Handout 3	* Handout 3
5 MIN	Post-Workshop Survey	<b>Distribute</b> the survey <b>Collect</b> the completed surveys	* Post-Workshop Survey
Group's Choice	Celebrate	<b>Celebrate</b> the completion of the workshops by: * Pass out Certifications of completion * Take group pictures with the certificates * Indulge on food items and drinks : )	* Certificates * Camera * Food items/ Drinks





## **WORKSHOP PREPARATION WORKBOOK CONT.**

- \* Who will help gather information? By when?
  
- \* Who will help compile information? By when?
  
- \* What do the results of the evaluation imply? How will you use the feedback?
  
- \* How can you encourage census building and collaboration to implement, monitor and evaluate the action plan?
  
- \* How can you encourage workshop participants to implement the action plan?

## WORKSHOP PREPARATION WORKBOOK CONT.

How to use the materials

- \* Handouts: When and how should you use them?
  
- \* What additional handouts should be used?
  
- \* What additional materials might be helpful for you to bring to the workshop?

**PRE WORKSHOP  
PLANNING**

**WORKSHOP 7  
MONITOR, EVALUATE  
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**SAMPLE AGENDA**

I.	Present objectives and agenda	7 MIN
II.	Review from last time	15 MIN
III.	Define and create objectives	25 MIN
IV.	Present Indicators	20 MIN
V.	Present Monitoring, Evaluating, Updating	20 MIN
VI.	Post - Workshop Survey	5 MIN
VII.	Celebrate	-- MIN

OUTCOMES AND INDICATORS

Outcomes	Indicators for outcomes
* Within ---- years improve academic performance among high school students	<ul style="list-style-type: none"> <li>* Community support of school district</li> <li>* High school dropout rate</li> <li>* SAT performance</li> <li>* Amount of illiteracy</li> <li>* Availability of quality &amp; affordable child care for young parents</li> </ul>
* Within ---- years improve housing situations among community members	<ul style="list-style-type: none"> <li>* Number of housing units</li> <li>* Availability of affordable housing</li> <li>* Availability of transitional housing</li> <li>* Number of homeless</li> <li>* Availability of shelter beds</li> </ul>
* Attract ten new businesses to the neighborhood within ---- years	* Number of business license applications
* Improve air quality by ----% by year ----	* Number of days above state & federal one hour Ozone standards
* Increase the safety of the neighborhood	<ul style="list-style-type: none"> <li>* Number of prostitution arrests</li> <li>* Number of calls for Police service</li> <li>* Change in responses to community surveys (before &amp; after comparison)</li> </ul>

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## MONTHLY PROGRESS SHEET

\* What projects are in progress? \_\_\_\_\_

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\* What are your new efforts? \_\_\_\_\_

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\* What efforts have succeeded? \_\_\_\_\_

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\* What barriers have you run into? \_\_\_\_\_

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## Post-Workshop Survey

1. How many of the four workshops were you able to participate in? \_\_\_\_\_
2. Were you satisfied with the results of the workshops?
  - a. Yes
  - b. No (Please explain)
3. What would you like to have seen done differently in the workshops?
4. Was the facilitator(s) effective?
  - a. Yes
  - b. No (Please explain)
5. Would you rather have had only one person facilitate all four workshops?(If there were more than one facilitator.)
6. Did you like the concept of residents of other communities involved in facilitating the workshops? Why? (If other residents were involved in facilitating)
8. Was the material presented in a clear manner?
9. Did you learn something new about community planning?
10. Did you have an opportunity to voice your opinion?
11. Did the group work well together during the brainstorming process?
12. Were there things you learned that you would use in the future?