

monitoring and evaluating our grants

SHINE aims to fund *efficient* organisations that deliver *effective* projects

We want our grants to make a difference by effective intervention in the lives of children and young people. Our monitoring and evaluation is *outcomes based*. We track, and ultimately evaluate, the effectiveness of projects funded by gathering, collating and analysing baseline, progress and final achievement data.

We believe that rigorous monitoring and evaluation is the best way to judge whether SHINE funded projects are actually making a significant difference to the lives and educational achievement levels of children and young people. We will commit time and resources to engaging in the monitoring and evaluation process in an active and involved way.

monitoring efficiency and evaluating effectiveness

SHINE monitors and evaluates all its grants. The organisations we fund clearly have responsibility for monitoring and evaluation at a day to day level in terms of the ground delivery level – and they have ownership of the project. SHINE is responsible for overseeing individual grants and for evaluating and developing our grant-making over time.

SHINE will:

- monitor efficiency – the organisation's competence and the quality of its service delivery;
- evaluate effectiveness – based on hard and soft project outcomes;
- offer support and advice to groups on monitoring and evaluation.

Our ultimate aim is to help improve children's educational achievement levels. Therefore, we want to be able to assess whether the projects we fund are meeting their objectives in terms of measurable educational outcomes.

In the final analysis of any given project, we want to be able to identify:

- what the project set out to achieve (objectives);
- project outcomes (results);
- successful and not so successful aspects of the project (learning); and
- the way forward (direction).

Our focus is:

- Accountability – efficient organisations.
- Impact – effective programmes.
- Learning – developing programmes.
- Replication – building on success.
- Fundraising – generating more funds.

working in partnership

SHINE wishes to work in partnership with the organisations we fund. A project's objectives and how outcomes will be measured are agreed at the application assessment stage, and monitoring and evaluation expectations are clearly mapped out in the funding agreement package.

SHINE makes a priority of supporting monitoring and evaluation activity, in an over-seeing role, through regular personal contact with the organisation throughout the lifetime of the grant. This includes visits, telephone conversations and correspondence. The timing and regularity of contact is agreed at the initial and subsequent monitoring and evaluation meetings.

One member of SHINE's staff is appointed as the nominated lead contact for each funded organisation. The initial monitoring and evaluation meeting is set up immediately following the grant agreement to:

- ensure that SHINE and the organisation are clear how the success of the project will be measured, how often progress will be tracked, and how the information will be reported to SHINE;
- discuss what monitoring and evaluation systems the organisation already has in place, and how duplication can be avoided;
- explore SHINE's involvement with the organisation, and whether there is anything SHINE can help the group with (this may be helping them to source specific resources, or volunteers, for example); and
- discuss any difficulties arising as project development starts, again exploring whether SHINE can be of support in any way.

Where an organisation has commissioned external evaluation of a project, SHINE will liaise closely and appropriately with the external evaluating agent.

In some cases SHINE may also commission our own independent evaluation of certain projects – for example where projects are highly innovative and potentially ground breaking.

measuring outcomes

While recognising the need for a mix of quantitative and qualitative information in measuring outcomes, SHINE evaluates projects primarily on the strength of 'hard', quantitative data: baseline, progress and final achievement data in the form of recent or expected exam results or customised or standard tests. Teacher assessment reports might be used where this information is not available or appropriate.

Ideally, a control group is tracked simultaneously in order to analyse the difference made to participants by the project. Obviously, when dealing with the lives of human beings, there is no such thing as a 'controlled environment', but evaluating a control group alongside a project can provide an effective benchmark.

The quantitative information which all projects are expected to provide is:

- number of participants;
- age of participants;
- total period of project, frequency and length of sessions;
- baseline assessment data;
- progress assessment data;
- final assessment data;
- overall achievement data, with comparisons to: the baseline assessment data, national averages (where relevant) and control groups (where relevant);
- attendance data; and
- unit costs.

Qualitative data - such as participants' attitudes to the project and changes in behaviour - is also important. This should be provided in addition to, not instead of, the quantitative information.

While the management and financial aspects of an organisation, and the project budget, are thoroughly examined at the application assessment stage, SHINE continues to monitor these aspects throughout the lifetime of a grant. As we are concerned to keep administrative burdens as low as possible, and we want the organisation to focus on delivering the agreed outcomes, we will review, at the end of each year, the organisation's annual report and audited annual accounts. In the intervening periods the funded organisation has a responsibility to inform SHINE of any significant changes to its management and structures or to its financial situation.