Monitoring and Evaluation guidance

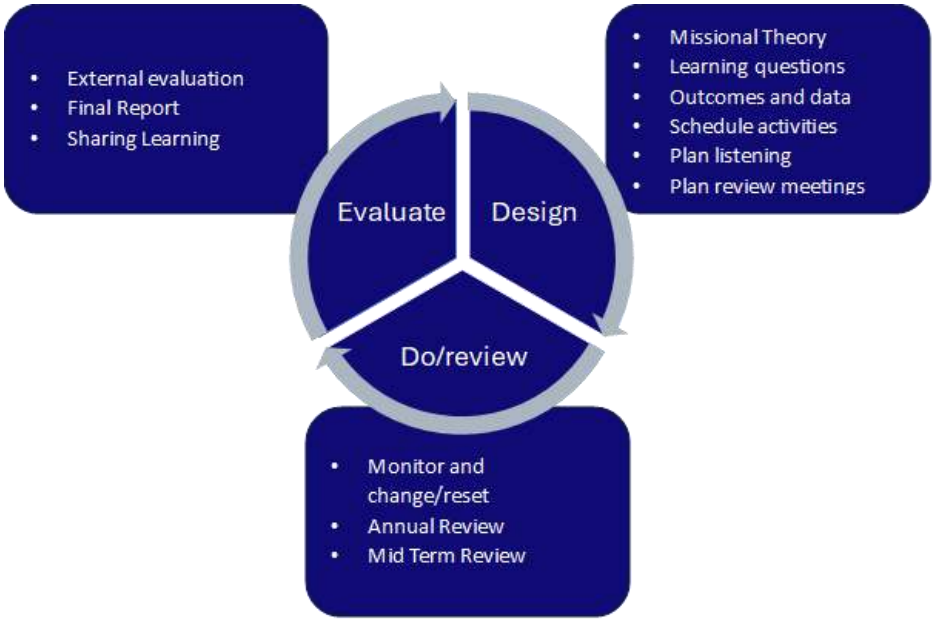
"By wisdom a house is built, and through understanding it is established; through knowledge its rooms are filled with rare and beautiful treasures."

Proverbs 24 v3-4

Continuous learning approach

Continuous learning is vital to achieve the transformation needed for our Bold Outcomes. Change involves both successes and setbacks. As faithful stewards, we are called to build on strengths and identify areas for growth. Asking thoughtful questions, listening carefully and recording data helps us to reflect, pray and make informed decisions.

This guidance aims to support dioceses/partners to embed learning throughout their programmes and to help the whole church to learn together.



When monitoring or evaluating, it's useful to be clear about:

Outcome	The change you want to achieve e.g. increase in worshiping community
Output	The direct results of the activities completed e.g. number of people trained
Measure	Data that demonstrates whether the change you want to see is happening
Baseline	Measurement taken at the start of the programme, against which you can measure what change has happened

1. Building monitoring and evaluation into the design

Building monitoring and evaluation into the programme design is vital to help teams to learn and adapt throughout. This helps the programme stay aligned to the intended outcomes and values. This involves building a learning culture in which everyone from volunteer to senior leader is curious and honest about the programme's progress. It helps the diocese/ partner and SMMIB to exercise accountability for the funds.

Create a Missional Theory

Teams identify:

- Their missional challenges
- The root causes
- The medium and longer term change they aim to bring about
- The way that these link with their activities

They think through the assumptions made.

Detailed missional plans outline the 'why, what, how, who, when' for the chosen interventions. These form the foundation for monitoring and evaluation to track and learn from the interventions.

Identify learning questions

Identifying learning questions can help teams to reflect throughout the programme on how their missional theory work in practice, and what changes might be needed. Eg:

1. What is the relative impact of the two models of delivery?
2. What are the specific implementation challenges faced by different types of churches - rural, urban, small, large, different traditions?
3. How does the programme meet needs experienced by people in areas of deprivation/ by people of global majority heritage?
4. What types and levels of support do volunteers need to promote and sustain the approach?

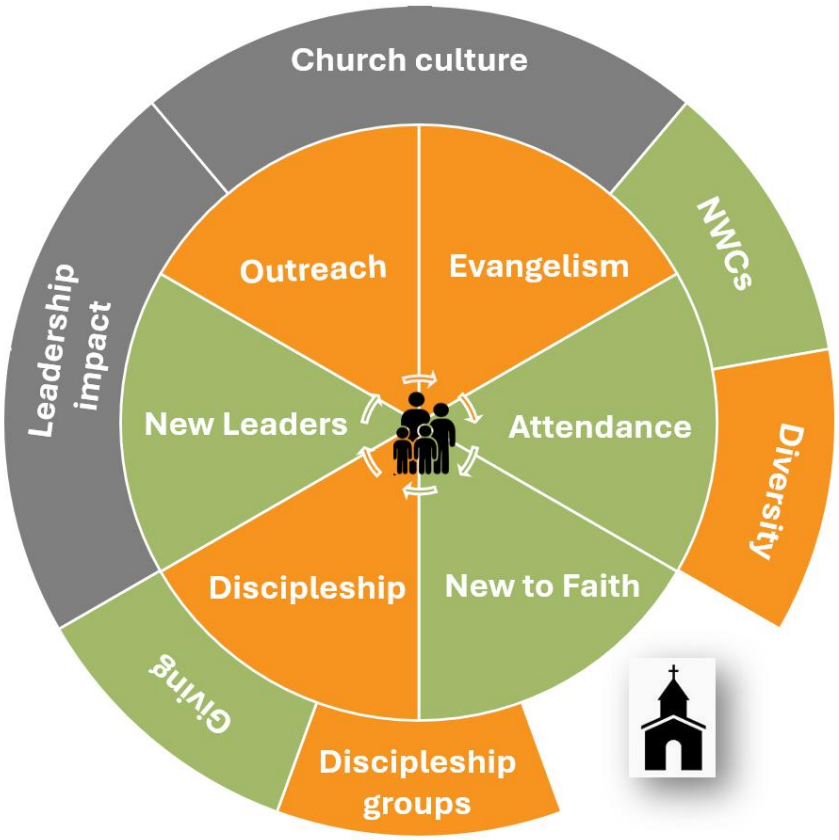
Outcomes and data

Teams need to identify what data will help them to understand the difference the programme is making, and to whom and to understand how the missional theory works in practice. With good listening and reflection, this data can help teams to prayerfully discern the way ahead.

This will be a combination of "Shared Outcomes" that are measured across all relevant programmes nationally and outcomes that are particular to the programme. It's useful to be able to look at data for individual churches, for particular initiatives and for the whole programme.

National Shared Outcomes

National Shared Outcomes need to be measured across in all SMMI funded programmes, where they relate to the programme. These were identified with Dioceses and partners. More details, definitions and tools can be found on the Church Support Hub.



Programme Specific Outcomes and questions

Programme management is best supported by a range of types of data. This normally includes measures that can be tracked in the short term (lead measures), longer term (lag measures). As well as figures, it involves descriptive (qualitative) data.

In addition to figures, teams need to consider how to structure opportunities to ask key questions of specific stakeholders and to capture perspectives or stories.
Eg asking NWC leaders from selected areas "What the important factors that enabled/inspired you to establish an NWC? What were the barriers? ".

Where useful, perspectives can categorised in a way that can be tracked over time or across different areas (e.g. using surveys or making judgements following set criteria). Some examples are given on the Church Support Hub pages about Shared Outcomes.

Programme teams should check that they have data to help them to learn about:
- Each element of the programme
  Eg looking at the impact of training in a leadership programme
- Outcomes for key groups of people
  Eg breaking down attendance change by under 11s and 11 – 17s or by deprivation.
- Their learning questions

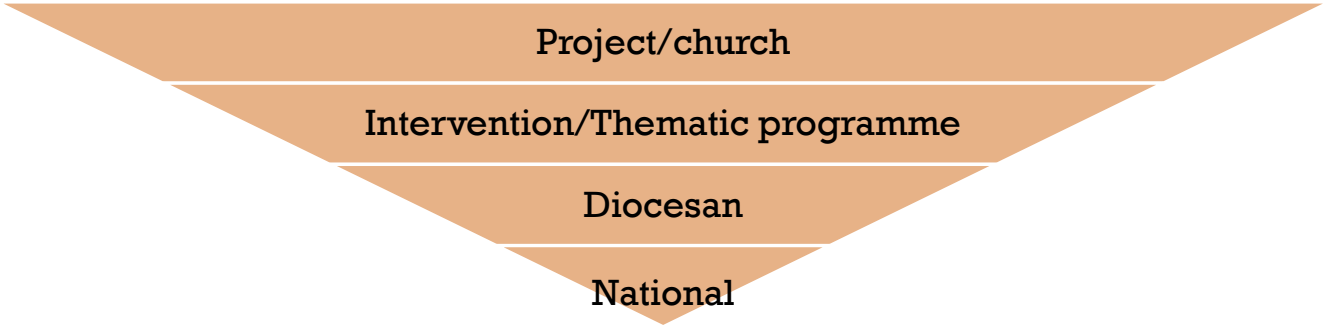
Many programmes will benefit from data that will help them to:
- Compare different elements

Eg online and in person training
- Look at how different elements support each other

Eg links between formation and CYP interventions

Consistent measurement

Consistent measurement is needed for figures to be meaningfully combined across different churches/programmes/dioceses and tracked over time.



E.g. the change in the **size of the worshiping community** is a shared outcome measure. This helps to track change consistently across churches, programmes and nationally. It can be used alongside other attendance measures.

Church leaders often need support to understand the importance of collecting consistent and accurate figures. E.g. if a church includes attendance figures from NWCs one year and not the next, it will appear that there has been a decrease in attendance. They will value the data more if they use it for learning themselves, and/or see it being used by the diocese for learning.

Tools for recording outcomes

Teams set out their measures in an "outcome framework". This includes:

- What records do we need to keep?
- What questions do we need to ask? Of whom?
- Who will collect data? When? How?
- How will it be stored and shared?

Example spreadsheets are available on the Monitoring and Evaluation page on the Church Support Hub, showing how outcomes can be laid out by dioceses. One example has tabs for recording data at different levels – by project, by initiative and by diocesan programme. The other just has one level. Partners follow a slightly different format.

Programme staff shared example of how their diocese is building up their use of monitoring data:

- **Programme staff using the data with individual parishes to celebrate how they have grown over the years**
- **Programme boards use rag rated data to identify the focus for each meeting**
- **Archdeacons are starting to look at the data from a parish before a visit, to help identify areas to discuss**
- **Senior leadership now use diocesan data to inform communications**

Design times for prayerful reflection

Teams identify:

- How will we use the data (numbers and perspectives) to prayerfully reflect on our progress?
- Who will be involved? How will church leaders and practitioners be involved?
- How will we make decisions about what changes need to be made?

Identify resources needed for learning

Appropriate resource needs to be planned for the monitoring and evaluation – including time for the baseline and a budget line included for evaluation and for external mid term review where needed.

Identify the baseline

Teams gather data before the programme starts, so that they can understand the change. For example, the size of the worshiping communities.

This is an opportunity to support those who are collecting and recording the data to ensure that they understand:

- How the data will help the programme to learn
- The definitions that will be used, and the importance of consistency

2. Monitoring during implementation

Monitoring in practice

"Be sure you know the condition of your flocks, give careful attention to your herds."

Proverbs 27 v23

Once the programme has started, good stewardship requires honest reflection about where the programme is most fruitful, and where it is less fruitful. There may be areas where the programme is thriving and other areas where there are more obstacles. These could relate to geography, thematic areas, levels of deprivation, age, ethnicity or backgrounds. They could relate to characteristics of churches or leaders. Good monitoring will use data and reflection to identify these, ask questions about why this is, and will lead to adaptation, changes or resets. Monitoring can take a variety of forms, from documenting activities, to understanding changes in attitudes and behaviours, to identifying the change brought about in people's lives.

Monitoring examples

Diocesan Programme The Diocesan Programme Board reviewed programme data to shape a meeting agenda. They used this to identify and support agenda items:

- How the Leadership Programme is serving the Regeneration Programme
- Progress across the programmes in deprived areas
- Sustainability and giving across all thematic programmes

They identified action points. Their learning contributed to learning for the wider church

Revitalisation Programme

The Revitalisation Programme Board identified low engagement with discipleship activities in churches in areas of deprivation. They explored with church leaders, identifying and addressing barriers to participation and accessibility.

The Community of Practice reflected together on course survey responses and shared their experiences. They focused on the variation in confidence levels in sharing faith.

St Michaels' church

The diocesan team worked with church leaders to encourage continuous reflection and learning. Discipleship course leaders reflected prayerfully after each session to ensure that it meets the needs.

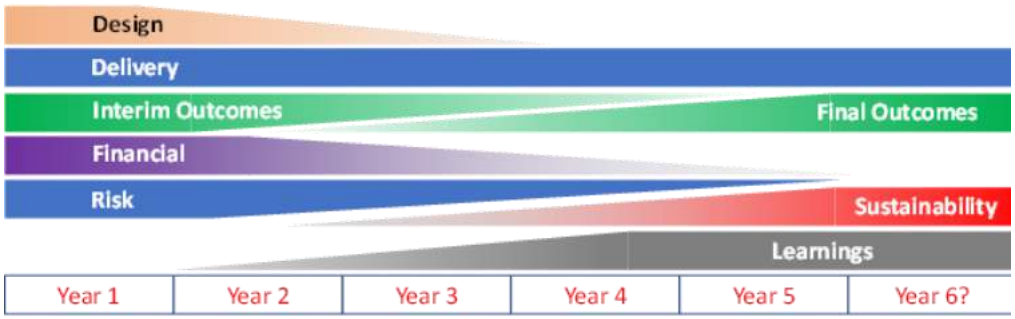
Whilst monitoring, teams also need to be alerted to **safeguarding** and to report any concerns according to their safeguarding policy. This includes looking out for high-risk conditions. This could be where governance and accountability are unclear, where there are significant power imbalances, or where people prioritise growth over wellbeing.

Annual Reviews

The Annual Review provides an opportunity to prayerfully reflect on the programme, to learn and to ensure accountability. These are led by the V&S team consultant. They are recorded in the Grants Management System. Programmes will look at:

- Outcomes to date compared to targets (figures and narrative)
- Delivery issues
- Budget
- Learning
- Good news stories

The focus will adapt as the programme progresses, for example:



Mid Term Reviews

Programmes that are 5+ years need to have a Mid-Term Review (MTR), approximately every three years. This gives a structured space to prayerfully reflect on progress and learning to date and is led by an external evaluator. This may be a "light" Mid Term Review, centred on reviewing the data and reflection with the programme team. For more complex programmes, this should involve interviews to help to reflect a broad range of perspectives. This would often take place instead of an Annual Review.

Looking back:

- What progress is being made towards the outcomes?
- Were the assumptions made in the Mission theory correct?
- What have we learnt in relation to our key learning questions?

Looking forwards:

- What is needed to achieve the desired change in the remainder of the programme?

Eg, increasing a particular activity, stopping a different activity, continuing as planned....

The evaluator should be part of the pool of experienced SMMI evaluators.

3. Evaluation

An evaluation seeks to draw together learning that has been generated across the life of the project/programme and critically test the theory we had about how change happens. We do this in pursuit of learning and growing together, rather than 'scoring our work'. As such, evaluation processes should be transparent, reflective, inclusive, and participatory.

The evaluation is a systematic way to learn about the relevance, fruitfulness, stewardship, impact and sustainability of a project or programme.

Relevance - How closely did we listen to the experiences of communities/people with lived experience and meet their needs?

Fruitfulness - What fruit did the programme/project bear? Did it bear the expected fruit? Was there unexpected fruit? For whom was it fruitful?

Impact - Is the change leading to lasting faith and transformation of communities?

Stewardship – Was there good stewardship over resources? Was the programme structured in the best way to make the most of time, gifts and energy?

Sustainability - Will our programme continue to bear fruit after the funding is over? Will worshiping communities and activities be sustained by local giving? Has our work energised the diocese/partner, churches and communities to continuously seek to understand and meet local needs?

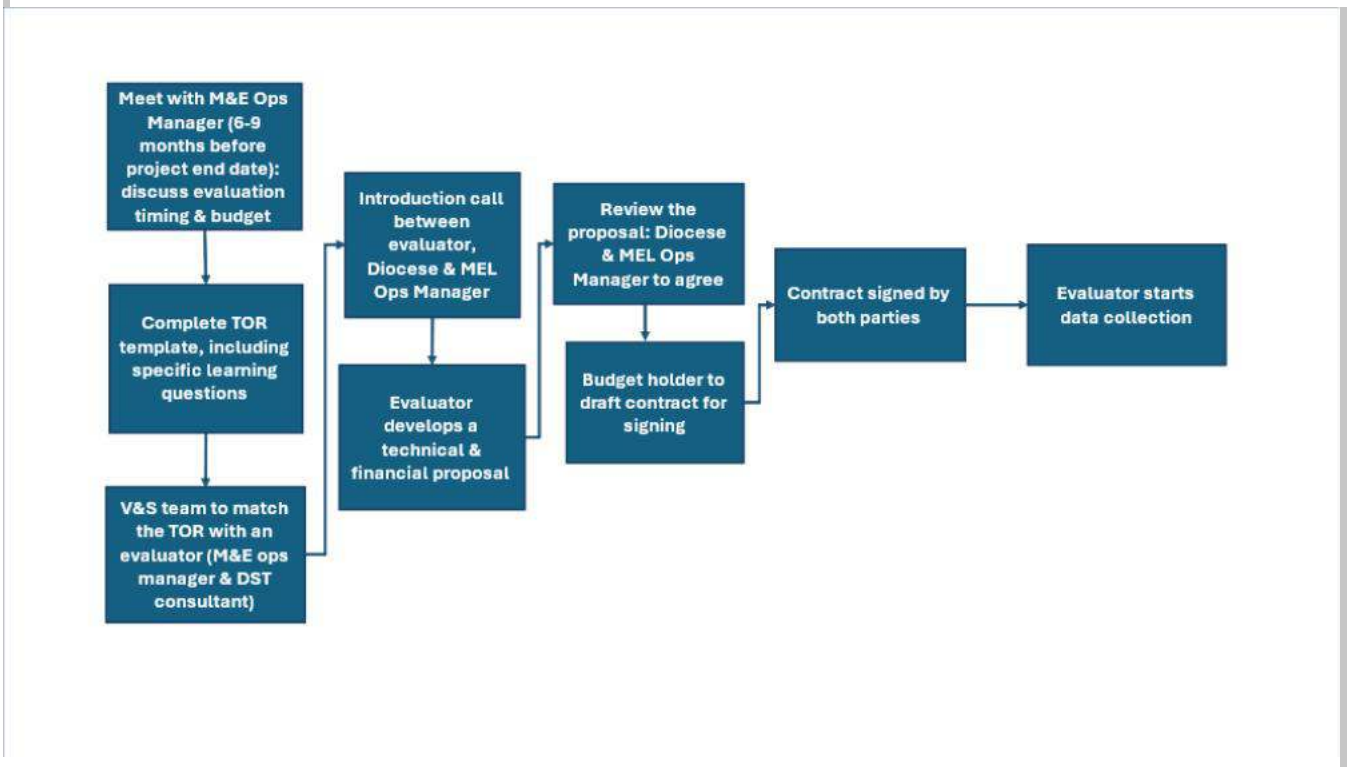
How could a future programme build further on the foundations laid in each of the above areas?

The evaluation aims to generate learning which will help dioceses/partners in their plans for growth, as well as the wider Church, as we grow the kingdom together. It is also important for accountability for the diocese and for SMMI as a whole.

All Grants above £250K require an external evaluation. The evaluation will be a shared endeavour, with the Grants Team managing the process of commissioning and signing off the review. Conversations need to start 9 months in advance.

- The evaluator will be selected from the pool of experienced evaluators for SMMI.
- The diocese/partner's role will include
    - Agreeing the scope and methodology of the review with the V&S team
    - Drawing together data and learning to share with the evaluator
    - Providing time & people to the reviewer as they conduct the evaluator
    - Reviewing the draft report
    - Providing clarity and direction on the facts and the tone of the report.

The report will outline the original context and mission theory; and includes what happened, the extent of the outcomes achieved (or not), and lessons for both the diocese and the wider Church.

To share learning, reports will be made available wherever possible on Church Support Hub (available only to Programme Managers, Bishops and Archdeacons). Where there are issues that need to be kept confidential, this can be an edited version, or only the executive summary.

Evaluation Commissioning Process