The Smarter Choice Consultancy

South Essex Partnership

South Essex Active Travel Monitoring & Evaluation

Guidance for Project Managers

June 2017

draft

Experts in travel behaviour change

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1. Introduction

1.1. What is monitoring & evaluation?

1.1.1. Monitoring and evaluation covers the collection and analysis of data about the *outputs*, *outcomes* and *impacts* of a project, and the wider programme which it is part of.

Input: What is invested (e.g. money, people, time, skills)

↓

Output: What interventions have been produced

↓

Outcome: Directly measurable short and medium term results

↓

Impact: Longer term changes

1.2. Why monitoring & evaluation is important

1.2.1. Monitoring and evaluation is an important element of programmes such as South Essex Active Travel (SEAT) because it enables:

1. **Good project management** – providing data that allows you as project managers to assess the efficacy of your approach and make adjustments to improve performance.
2. **Good programme management** – providing the Programme Management Team (PMT) with data that allows them to assess the performance of all SEAT's component projects and ensure partners are delivering their agreed outputs.
3. **Understanding of the effectiveness of the programme** – providing data on the outcomes and impacts of this £4.15m investment by SEAT partners and the Department for Transport (sponsor of the Access Fund), to see whether it met the targets outlined its original funding bid.
4. **Better design and delivery of future sustainable transport projects** – providing an understanding of what works in the South Essex region and the potential order of magnitude of outcomes and impacts; which can be used to inform the design and delivery of future projects and make the case for funding these to local, regional or national decision makers.

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2. How SEAT will be monitored and evaluated

2.1. Overview

2.1.1. SEAT's overall approach to M&E has been set by the PMT to ensure that:

a. Across the programme opportunities to collect data are not missed.

b. Methods, questions and data formats are standardised as much as possible so that it is possible to compare and aggregate data from across all SEAT's projects.

2.1.2. There are five main data collection or data sharing mechanisms to SEAT's M&E approach:

1. Customer Satisfaction Surveys
2. Quarterly Project Monitoring & Evaluation Reporting
3. Participant Outcomes Survey
4. Volunteer Outcomes Survey
5. Stakeholder Focus Groups

2.1.3. How these fit together is illustrated in Figure 1. More detail on each is given in the sections below.

2.1.4. Data from the Participant Outcomes Survey and Volunteer Outcomes Survey will be analysed at the end of each financial year by an independent M&E body and their findings fed back to projects. This body will also compile a full M&E report on the SEAT programme in spring 2020, which will include estimations of the programme's wider transport, health and economic *impacts*.

Outputs:

Quality assured by Customer Satisfaction Surveys and reported by Quarterly Project M&E Reporting

Outcomes:

Captured by Participant Outcomes Survey, Volunteer Outcomes Survey and Stakeholder Focus Group

Impacts:

Estimated from Participant Outcomes Survey data

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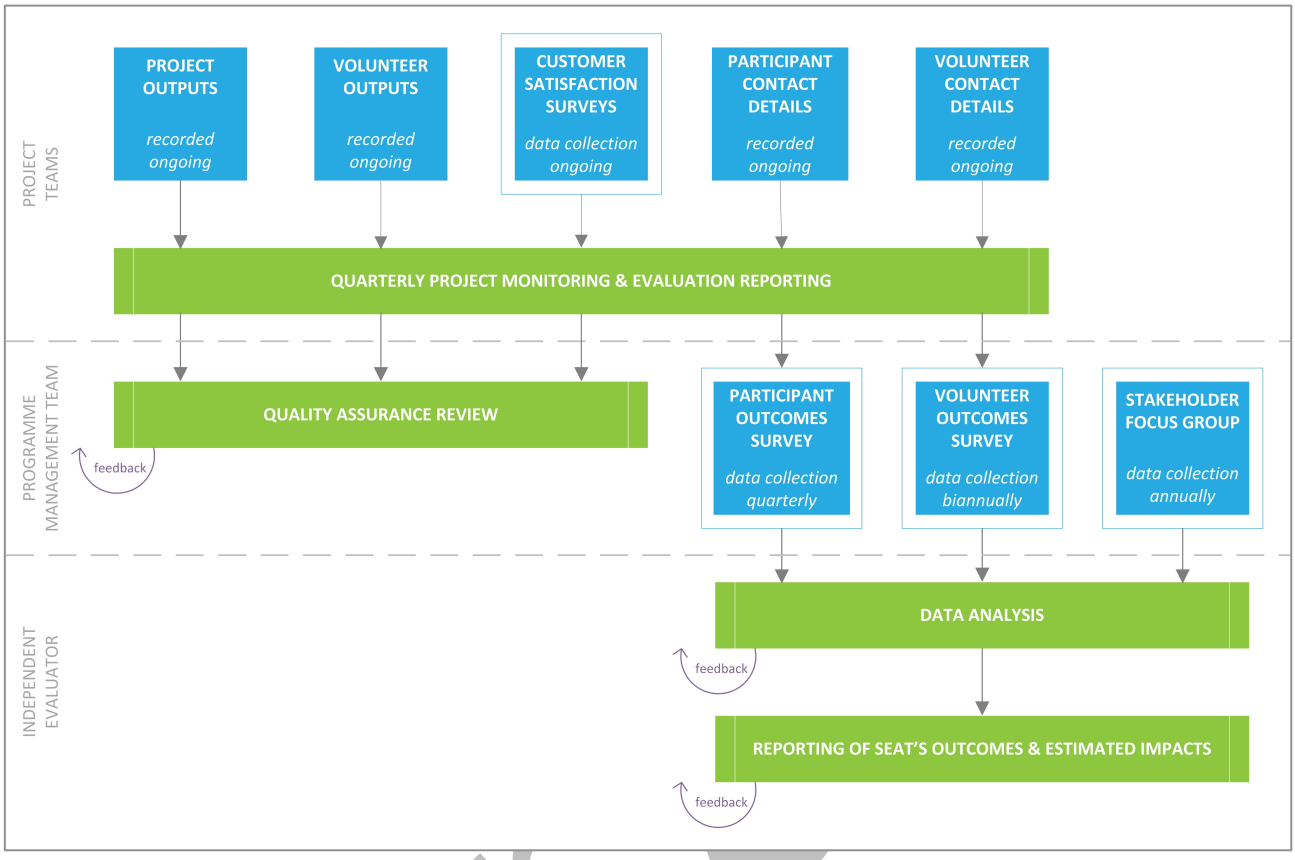
Figure 1: SEAT Monitoring & Evaluation Process



2.2. Customer Satisfaction Surveys

2.2.1. Paper or online surveys run as part of the delivery of individual projects; gathering initial feedback on participants' satisfaction with individual engagement processes and services, and their contact details. Headline questions will be standardised across projects and reported via Quarterly Project Output Reporting. Data to be used by project manager and PMT to quality assure *outputs* and to enable participation in the Participant Outcomes Survey.

2.3. Quarterly Project Monitoring & Evaluation Reporting

2.3.1. Project managers to use a standardised spreadsheet to report to PMT at the end of each quarter:

1. Project outputs
2. Participant contact details
3. Customer satisfaction metrics
4. Volunteer outputs
5. Volunteer contact details

2.3.2. This M&E reporting requirement will be in addition to any other progress or budgetary reporting required by PMT for wider programme management purposes.

2.4. Participant Outcomes Survey

2.4.1. Quarterly online survey to be run by PMT, gathering feedback on if and how participants' travel and access to opportunity has altered as a result of the advice and/or services they received, i.e. what the *outcomes* were. Participants from the previous quarter to be invited to complete the survey at the start of each new quarter. Data from this survey will be used to analyse project and programme outcomes.

2.5. Volunteer[1] Outcomes Survey

2.5.1. Online survey to be run twice a year, gathering feedback on the experience and outcomes of individuals gaining work experience, volunteering or training through the delivery of SEAT projects. To be used to assess the *outcomes* of SEAT for strengthening the local sustainable transport workforce and providing opportunities for people to become more 'job ready' and employable.

2.6. Stakeholder Focus Groups

2.6.1. Annual workshops with project delivery partners and representatives of beneficiary organisations (e.g. HE/FE, key employers, schools) to assess their expectations and experience of the programme, as well as to review their perceptions of *outcomes*.

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[1] Volunteer used for brevity but wherever this is referred to it also covers work experience pupils, interns, apprentices and other trainees engaged in project delivery.

3. Project managers' monitoring & evaluation responsibilities

3.1. Overview

3.1.1. As a project manager, your responsibilities for enabling the effective monitoring and evaluation of SEAT are:

1. Record you project's outputs.
2. Collect participants' contact details.
3. Collect and analyse customer satisfaction data (for at least the three standardised metrics)
4. Record data for four standardised volunteering output metrics.
5. Collect volunteers' contact details.
6. Update your Project Monitoring & Evaluation Reporting spreadsheet at the end of each quarter – to report the data for each of the five requirements above.
7. Ensure any questionnaire asking about mode of travel uses the standardised question.

3.1.2. Your project will also need to be represented at the annual **stakeholder focus group** meeting.

3.2. Collection of participant information

3.2.1. You need to collect and report:

a. **Contact details** for the people who participate in your project; so PMT can invite them to participate in the Participant Outcomes Survey.

b. **Customer satisfaction data;** so you and PMT can evaluate the effectiveness of your project.

3.2.2. How you collect these will depend on the service / product you offer, the specific points at which you engage with participants, and the processes you use for this. You just need to be aware this information is required by PMT and to 'design in' its collection to your project.

Participant contact details

3.2.3. Participant contact details may be collected at the start or end of your engagement process. Bear in mind you do not need to provide these to PMT until *after* the participant's involvement in your project has ended (so you would need to cross-check exiting participants with this data each quarter if you only collect it at the start, and if your engagement will run for longer than 3 months). Also, participants' contact details could change. Therefore it might be useful to build in a point at the end of your engagement when you collect, or at least double check, contact details.

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3.2.4. When you collect participants' contact details you need to make them aware of the following disclaimer:

South Essex Active Travel will contact you at a later date to give you the chance to take part in a survey about if and how our service has helped you. By submitting this form you are authorising us to share your personal details with our partners carrying out that survey.

Customer satisfaction data

3.2.5. Customer satisfaction data needs to be collected at the end of your engagement process, as participants exit your service.

3.2.6. There are three standard customer satisfaction questions all projects should ask participants, which will be reported against each quarter. These are:

1. How satisfied were you with the service you've received?
   a. Very satisfied
   b. Quite satisfied
   c. Not satisfied
2. Would you recommend the service to a friend?
   a. Yes
   b. No
3. Do you have any specific comments about the service you have received?

3.2.7. For your own project evaluation and improvement purposes you might wish to ask additional questions, such as ones related to:

- How participants heard about your service.
- Why they decided to engage with your service.
- Their satisfaction with specific elements of your service (e.g. with staff / advisors, with the process, with the information / training / product received).
- Gender, ethnic origin and age of participants.

3.2.8. When you collect customer satisfaction data you need to make participants aware of the following disclaimer:

By submitting this form you are authorising us to share your customer satisfaction data with other South Essex Active Travel partners responsible for monitoring this project.

3.3. Submission of quarterly reporting

3.3.1. You will be supplied with a Project Monitoring & Evaluation Reporting spreadsheet, which will contain a tab for each of the five sets of information you must report against.

3.3.2. This spreadsheet must be updated promptly at the end of each financial quarter and sent to the PMT by the first Friday of each new quarter. See Table 1 for relevant reporting deadlines.

Table 1: Deadlines for Quarterly Project Monitoring & Evaluation Reporting

Reporting Period	Reporting Deadline
April – June 2017	7th July 2017
July –September 2017	6th October 2017
October – December 2017	5th January 2018
January – March 2018	6th April 2018
April – June 2018	6th July 2018
July –September 2018	5th October 2018
October – December 2018	4th January 2019
January – March 2019	5th Aril 2019
April – June 2019	5th July 2019
July –September 2019	4th October 2019
October – December 2019	3rd January 2020
January – March 2020	3rd April 2020

3.4. Data transfer

3.4.1. Your organisation is required to sign SEAT's data sharing agreement and to adhere to the practices within that; ensuring the safe storage, sharing and use of Project M&E Reporting spreadsheets containing personal contact details.

3.5. Mode of travel questions

3.5.1. If as part of your project you routinely ask participants about their mode of travel to education / training / employment, you need to use a standardised question. This will ensure any mode of travel data aggregated from different projects is compatible.

3.5.2. The question and answer categories you should use (adapting as necessary for your target audience's typical destination) is:

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In a typical week what is the main mode of transport you use on the majority of days you travel to school / college / university / training / work?

a. Car – drove alone
b. Car – as passenger (e.g. pupil driven by parent / employee driven by partner)
c. Car share – with other pupils / students / trainees / employees
d. Train
e. Bus
f. Cycle
g. Walk
h. Motorcycle / moped / scooter
i. Taxi
j. Other
k. Work from home
l. Don't currently travel to education, training or work

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