Section 9: Monitoring and evaluation

Monitoring and evaluation are essential for assessing the performance of the resource centre and identifying ways of improving it.

This section includes:

9.1 Why monitor and evaluate?
9.2 Monitoring
9.3 Evaluation

Related sections include:

1.1 Assessing information needs
1.2 Strategic planning
2.2 Advisory committees
7 Information services
8 Making links and promoting the resource centre

9.1 Why monitor and evaluate?

Monitoring means keeping records of different resource centre activities. Evaluation means using these records and other information, such as user surveys and focus group discussions, to review performance at set intervals and identify ways to improve the resource centre and its services.

Evaluating resource centre activities enables the parent organisation or donors to know how useful the activities are. Donors usually expect to receive an evaluation report at set intervals, such as every three years or at the end of a project or programme phase. Parent organisations should also receive evaluation results, to demonstrate how well the resource centre is helping the organisation to fulfil its mission.

Evaluations can vary greatly in scale and style. An evaluation might cover the whole range of resource centre activities, or it might focus on an individual activity, such as the enquiry service. The evaluation process – analysing data, drawing conclusions and making recommendations – might take more than a week or it might take less than a day.

Collecting and analysing data might involve an outside evaluator, such as a representative of a donor agency, and/or the evaluation might be a ‘participatory evaluation’ involving resource centre staff and users. Participatory evaluation provides an excellent opportunity for staff to learn from their experiences and contribute to the continuing development of the resource centre.

Evaluation requires a combination of ‘quantitative’ and ‘qualitative’ data:

- **Quantitative data** is data that can be measured, such as the number of visitors, the number of written and telephone enquiries, the number of searches carried out by staff, the number of subjects requested, or the number of sources used to provide information requested. Quantitative data is collected through monitoring (see Section 9.2).
- **Qualitative data** is data that cannot be measured, such as users’ opinions about the resource centre, and how they have used information obtained from the resource centre. Qualitative data is collected through questionnaires, interviews and focus group discussions (see Section 9.3).

9.2 Monitoring

It is useful to monitor key aspects of the resource centre and its services, to provide information that can be used to evaluate these activities. Before deciding what to monitor, it is important to know what is to be evaluated, and how the information collected through monitoring will be used for evaluation.

Monitoring can be a regular activity, such as keeping monthly records of the number of enquiries received, or a periodic activity, such as keeping records for a three-month period, or for three separate months over the course of a year.

If monitoring is being carried out regularly, it is better to collate the records (add up the figures) each month, when it will not take long, than to leave it until the end of a quarter or a year, when it will take much longer.

TIP: Collating records
To collate records easily, take an unused monitoring form (see sample in Section 9.2.2) and write the relevant monthly or yearly totals in or next to the relevant boxes.

The same form can be used for both visitors and enquiries. However, it is useful to collate the records separately, as visitors and enquirers may have different information needs.

9.2.1 What to monitor

It can be useful to keep records of:

- availability of the service
- visits
- acquisition of materials
- materials used
- services used
- enquiries
- website 'hits' (use of your website)
- publications
- promotion
- networking.

The following are suggestions for information to collect in each of these areas. More or less detail could be collected in each area, depending how the information is to be used.

1. **Availability of the service**
   - number of hours intended to be open per month (or quarter or year)
   - number of hours actually open per month (or quarter or year)
   - number of hours the resource centre was staffed per month (or quarter or year).

2. **Visits**
   - total number of visits made each month
   - number of visits made by each user each month, or the total number of repeat visits
   - average number of visits made each day that the resource centre is open
   - number of visits made each month by different categories of user (such as hospital doctors, nurses, community health workers, administrative staff, regional and district health team members, students and others).

   This information can be obtained by asking visitors to fill in either a visitors' book which invites this information (see Section 7.2.1: Welcoming visitors), or a monitoring form. A sample monitoring form is given in Section 9.2.2.
   To make sure that information from visitors is collected, staff must either check that each visitor has completed the visitors' book or monitoring form before the visitor leaves, or staff must enter details themselves, based on information gathered while assisting the visitor.

3. **Acquisition of materials**
   - total number of new acquisitions (books, periodicals, reports, slide sets, audio-cassettes, videos)
   - total number of materials for which new editions have been obtained
   - total number of materials weeded
   - number of new acquisitions as a result of efforts made by staff or the resource centre advisory committee and other users
   - number of new materials paid for and average cost
   - number of materials donated, or exchanged for publications
   - number of materials obtained that were published in the country/region
   - number of materials added to each subject area of the collection in the past month.

   Most of this information can be obtained from the accessions register (see Section 4.6.2), and entered onto a form. It is important to collate these records regularly, such as once a month. Otherwise it becomes a time-consuming task, and there is a risk that it will not get done, and that the information will be lost.

4. **Materials used**
   - subject areas most often requested or used in the past month
   - types of materials most often requested or used in the past month.

This information can be obtained from visitors' records (see Section 9.2.2), the accessions register (see Section 4.6.2), loans records (see Section 7.5.2), and from the materials that are re-shelved after use.

5. **Services**
   - number of times the various services offered to visitors are used per month (such as lending, photocopying, use of the database, document supply, or literature searches).

   This information can be collected from visitors' records (see Section 9.2.2), loans records (see Section 7.5.2), document supply records kept by staff, and notes kept by the resource centre officer on the number and types of literature searches undertaken.

6. **Enquiries**
   - number of enquiries per month
   - average length of time taken to respond to enquiries
   - subject areas requested
   - materials used to answer enquiries
   - geographic areas where requests come from (such as the district, or whether urban or rural).

   This information can be obtained from the enquiries forms which are completed for each enquiry (see Section 7.11).

7. **Website 'hits' (use of your website)**
   - 'total unique sites' or number of users who have visited your website
   - geographic location of these visitors, by country
   - 'search strings' or text that visitors have typed into search engines to reach your site (useful for developing keyword metatags).

   This information can be obtained monthly from most internet service providers (ISPs). When selecting an ISP, ask whether they will provide this information, how it will be presented, and how detailed it will be.

8. **Publications**
   - number and types of publications produced (such as current awareness bulletins, resource lists, articles, newsletters, or information packs)
   - number of each publication distributed
   - groups of users and locations to which publications have been distributed
   - number of publications that have been produced on time.

   This information can be collected from publications distribution records and staff notes.

9. **Promotion**
   - amount of time spent on promotional activities

- number of people from the promotion target group who have visited the resource centre or made enquiries in the two months before and after the promotion
- number of materials of the type promoted that have been used or requested in the two months before and after the promotion.

This information can be collected from staff notes and resource centre advisory committee meeting minutes, and from visitors' records (see Section 9.2.2) and enquiries records (see Section 7.11).

10. Networking

- number of organisations networked with
- number of referrals to and from other resource centres
- number of documents supplied to and by other resource centres.

This information can be collected from visitors' records (see Section 9.2.2), enquiries records (see Section 7.11), document supply records (see Section 7.7), and staff notes.

9.2.2 Sample monitoring form

Membership number ________

VISITOR TO HEALTH INFORMATION PROJECT RESOURCE CENTRE

(If necessary, please seek assistance from the resource centre officer when filling out this form)

Name ________ Date ________

Address ________

____

____

Have you visited the resource centre within the last 12 months?

☐ Yes ☐ No

If yes, and the following information is unchanged, you need not complete the rest of the form.

Are you part of a group visit to the resource centre? ☐ Yes ☐ No

Are you a student? ☐ Yes ☐ No

OCCUPATION (tick one only)
Health/development personnel ☐
Information worker ☐
Management/admin/support ☐
Researcher/consultant ☐
Training/education ☐
Other *(please specify)* ________

Please continue overleaf

ORGANISATION (tick one only)
Academic institution ☐
Business/commercial ☐
Field office ☐
Government ☐
Health service ☐
NGO ☐
Religious ☐
Individual ☐
Other *(please specify)* ________

SUBJECT AREA OF INTEREST ________

COUNTRY/REGION OF INTEREST ________

DATABASES SEARCHED
Bibliographic ☐
Audiovisuals ☐
Contacts ☐

CD-ROMS SEARCHED
African Health Anthology ☐
POPLINE ☐
Reproductive Health Library ☐

TYPE OF MATERIALS USED
Books ☐
Reports ☐
Periodicals ☐
Health education materials ☐
Audiovisuals ☐

COMMENTS/SUGGESTIONS
Please let us have any comments about the resource centre and information services and suggestions for how we can improve them.

____

____

____

Thank you for completing this form.

9.3 Evaluation

To evaluate the resource centre, 'qualitative data' is needed, as well as the 'quantitative data' collected by monitoring.

9.3.1 Collecting qualitative data

Qualitative data, such as users' opinions, can be gathered in different ways. For example, users could be asked to complete a questionnaire, or they could be interviewed using the questionnaire as a structure for the interviews. Questionnaires could be given to a representative selection of visitors and enquirers, to keep the number of questionnaires down and make them easier to analyse.

Questionnaires sent to enquirers should be accompanied by a copy of the original request and the reply, including details of the materials that were supplied. This is particularly important if the questionnaire is sent some time after the enquiry was made (such as more than six months).

Focus group discussions (small group discussions) could be set up for staff or students of the parent organisation, visitors and more distant users. They could be organised as part of a national or regional meeting attended by users of the resource centre. Users could discuss their opinions of the resource centre and its services, what impact information from the resource centre has had their work, and what subjects and services they require.

Information gathered through questionnaires and focus group discussions can be used both for evaluation and as part of ongoing needs assessment (see Section 1.1).

9.3.2 Using the data

The data collected through monitoring and questionnaires or discussions can be used to answer questions such as:

- What impact does the resource centre have on users?
- How far does the resource centre meet the needs of users?
- What do users save by using the resource centre?
- Are enough people being reached?
- Does the resource centre meet the needs of the funding organisation?
- How useful are the materials?
- What does it cost users to obtain information?
- How skilled are staff?
- How well is the resource centre networking?
- How useful are the resource centre's publications?
- Are the systems for selection, indexing, cataloguing and retrieval cost-effective?
- How can the resource centre increase its collection and improve its services in the most cost-effective way?
- What improvements are the most cost-effective and beneficial?

1. **What impact does the resource centre have on users?**
   Has using the resource centre or the enquiry service helped users to carry out their work or studies? Has information from the resource centre led to any particular action or change in work practices?

   This information can be obtained from the monitoring information and comments made by users through questionnaires and discussions.

2. **How far does the resource centre meet users needs?**
   Do users believe that the resource centre is meeting their needs?

   It is also useful to consider whether the resource centre was established in response to a demonstrated need. Many resource centres grow from an individual campaign and are based on staff's view of what is needed, rather than the views of the community that they aim to serve. It is worth checking whether a needs assessment was carried out, and whether the collection and services reflect the needs identified in the assessment.

   This information can be obtained from documents about setting up the resource centre, and by asking users how far the resource centre is meeting their needs. Users can also be asked what they expect of the resource centre and what services are available elsewhere. It is useful to note how many users visit the resource centre more than once, as repeat visits help to show how useful the resource centre is. Similarly, it is useful to note how many enquirers make more that one enquiry. A second request on a different topic suggests that the user was satisfied with the response to their first enquiry. A sample of enquirers could be contacted to obtain more detailed feedback about how useful they find the services.

3. **What do users save by using the resource centre?**
How much time, money and effort would users have to spend to obtain information, if the resource centre did not exist? For example, they might have to travel further, or they might have to visit several different resource centres. If they could not obtain the information they need from elsewhere, this would mean that the resource centre was providing a unique service. Even if the resource centre was not very efficient, being unique could be a key strength.

   This information can be obtained through focus group discussions and questionnaires, and through knowledge of what other information services exist, what subject areas they cover and what services they provide (see Section 1.4.2).

4. **Are enough people being reached?**
How clearly defined is the resource centre's target audience, and are enough of them being reached? For everyone who comes to the resource centre, there are sure to be many others who do not know that they need information or do not know where to find it. Is the resource centre publicised in places where potential users go, such as training institutions, religious centres or community groups? Is it possible to identify sections of the community who need the services but are not using them?

   To answer these questions properly, it is necessary to know the size of the target audience, such as the number of health workers or trainers in the area covered by the resource centre. It is also important to look at efforts to promote the resource centre to members of the target audience who were not previously using it, to see how well the promotional activities have worked.

   This information can be obtained from the records of visitors using the resource centre, enquiry services, and number of users before and after promotional activities. It can also be obtained from the opinions and ideas of users for whom promotional activities are targeted, including those that have not used the resource centre.

5. **Does the resource centre meet the needs of funding organisations?**

   This information can be obtained by checking funding organisations' goals and criteria for supporting the resource centre, and comparing these with the results of monitoring and evaluation.

6. **How good are the materials?**
How often are the materials used? Are there many materials that are rarely used? Are some subject areas more popular because they are more up-to-date? Are both resource centre staff and users clear about the subject areas covered by the resource centre? Have all the subjects or material formats requested in the needs assessment been regularly used? If they are not, does the collection policy need to be changed, do materials need updating, or is more promotion required?

This information can be obtained from the monitoring information and user questionnaires and discussion.

7. **What does it cost users to obtain information?**
How much time do users spend learning to use systems such as the classification scheme, catalogue or database? How easy is it for them to use these once they have learned how? How do the advisory services and information skills training provided by staff help users to find information in the resource centre?

   This information can be obtained by providing advisory services (see Section 7.4), and through user discussions and questionnaires.

8. **How skilled are staff?**
Can staff provide information as well as process materials? Are staff friendly and helpful? Are they involved in planning new developments and knowledgeable about what is going on? Do they need more training?

   This information can be obtained from user discussions and questionnaires, and discussions with the resource centre advisory committee and resource centre staff about staff's capabilities and training needs.

9. **How well is the resource centre networking?**
Are enquiries received from other organisations or individuals, such as public libraries, research organisations, community groups or individual experts? Are enquiries from users referred to other resource centres? Have efforts been made to eliminate duplication by sharing responsibilities, such as collection, processing and storage, with other groups? Is there a file of people or organisations who can provide information and share their expertise? Staff should not simply add names of useful contacts as they hear about them, but they should go out and ask people if they will collaborate with the resource centre.

   This information can be obtained from staff records, minutes of resource centre advisory committee meetings and discussions with staff.

10. **How useful are the resource centre's publications?**
Are publications such as current awareness bulletins, information packs, newsletters, articles, or resource lists produced? Are they accurate, legible, appropriate to users and efficiently distributed? Do users find them useful and timely? Are they a worthwhile activity in terms of the time and resources available to the resource centre?

    This information can be obtained from staff records for preparation and distribution, users' discussions and questionnaires, and staff comments about the time and effort taken to prepare publications.

11. **Are systems for selection, indexing, cataloguing and retrieving information cost-effective?**
How much does it cost to process each material in the collection (in terms of both staff time and materials)? How long does it take to process materials (for example, accessioning, cataloguing and classifying, entering records onto the database, and quality controlling)? Are these systems worth the staff time involved, because they speed up the retrieval process, or do they take more time than can be spared?

    This information can be obtained by monitoring the time taken to process materials, looking at the records of information searches that have been carried out, how long searches have taken, and how far they have met users' needs. Opinions expressed through staff and user discussions and questionnaires are also important.

12. **How can the resource centre increase its collection and improve its services in the most cost-effective way?**

    This information can be obtained by listing ways in which the resource centre can increase its collection and improve its services, and then identifying which of these are least expensive in terms of money and staff time. Comments from users can be obtained from the suggestions/comments box, monitoring forms, and questionnaires and discussions.

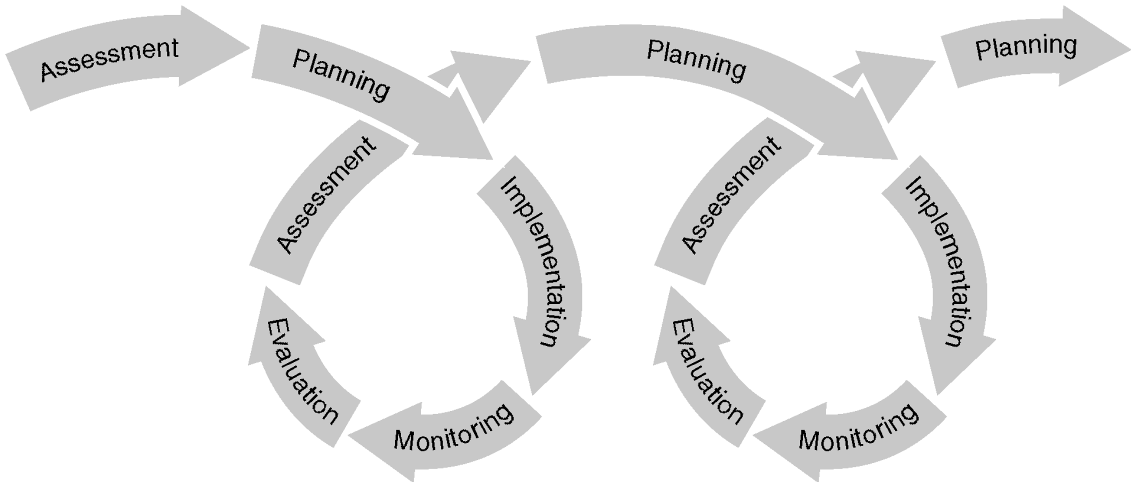
13. **What improvements are the most cost-effective and beneficial?**

    This can be decided by comparing improvements that are cost-effective with what users most need, and reaching a balance. It makes no sense to offer services that the resource centre cannot afford, but if there is a choice of services that can be offered, the needs of the users should always come first.

9.3.3 Using the results of an evaluation

The purpose of carrying out an evaluation is to help improve the resource centre and its services. The process of evaluation demonstrates what is being done well and should be continued, as well as what needs to change and what additional activities could be undertaken. Poor results are as important as good ones, as they can point to ways to improve a service.

Evaluation results should be used to identify new objectives, and develop new action plans (see Sections 1.2 and 1.3). They may result in changes to how the resource centre is run, what it collects and what services it provides. They may also identify staff training needs, to enable staff to carry out their work efficiently and provide the services required.



The planning cycle