



Information on Monitoring and Evaluation

Monitoring

Monitoring is the data you need to regularly collect on each area of EDI guidance you have in your policy to see that practice is according to the policy.

You will need to work out how you monitor each area of guidance you have in your policy, that is what data you need to collect, how you will collect it, who is responsible for collecting this and a timetable for collection. For example, in the sections to do with staff such as fair employment and career progression, you could decide to monitor achievement levels and grievances raised to see if achievements are disproportionately low for people with protected characteristics and grievances disproportionately high.

Monitoring is also done to collect feedback from people using services. In this case it is useful to collect demographic data at enrolment or the first appointment. You will need to explain the reasons for collection to users. CECF has found that if a reasonable explanation is given, people are willing to respond although they may still choose to withhold a response to some questions. You will need to follow data protection and confidentiality rules in collecting and storing personal data. There is a link to information on data protection and confidentiality in the guidance links at the end of the transcript.

For example, when you monitor to see satisfaction rates following the service, you can link it to demographic data to ensure that there are not lower satisfaction rates among a particular protected characteristic group. If there are it could mean an EDI issue.

It is important to only undertake monitoring that is possible to do. For example, you may decide each year that you will look at one area of your policy to monitor.

Evaluation

Evaluations pick up more quality information on EDI, because they give more in-depth views on what people perceive and feel or concerns that they have. For example, in a refugee resettlement project people tended to answer monitoring questions with a simple Yes / No response. In the evaluation, refugees were able to talk in more depth about what they felt about discrimination and difficulties in finding employment, as well as what the organisation could do to improve support, which had EDI implications.

Evaluation helps with the following:

- Information to evaluate what factors led to success and what caused lower achievement.
- EDI lessons learned, both in terms of what worked and what didn't and how these can be used to guide further provision.

- Any additional or unexpected EDI outcomes. For example, as a result of attending the training course, colleagues shared personal stories and were motivated to set up a staff-run EDI forum for female staff members.
- An overview of what this tells you about EDI and how it will affect your organisation.