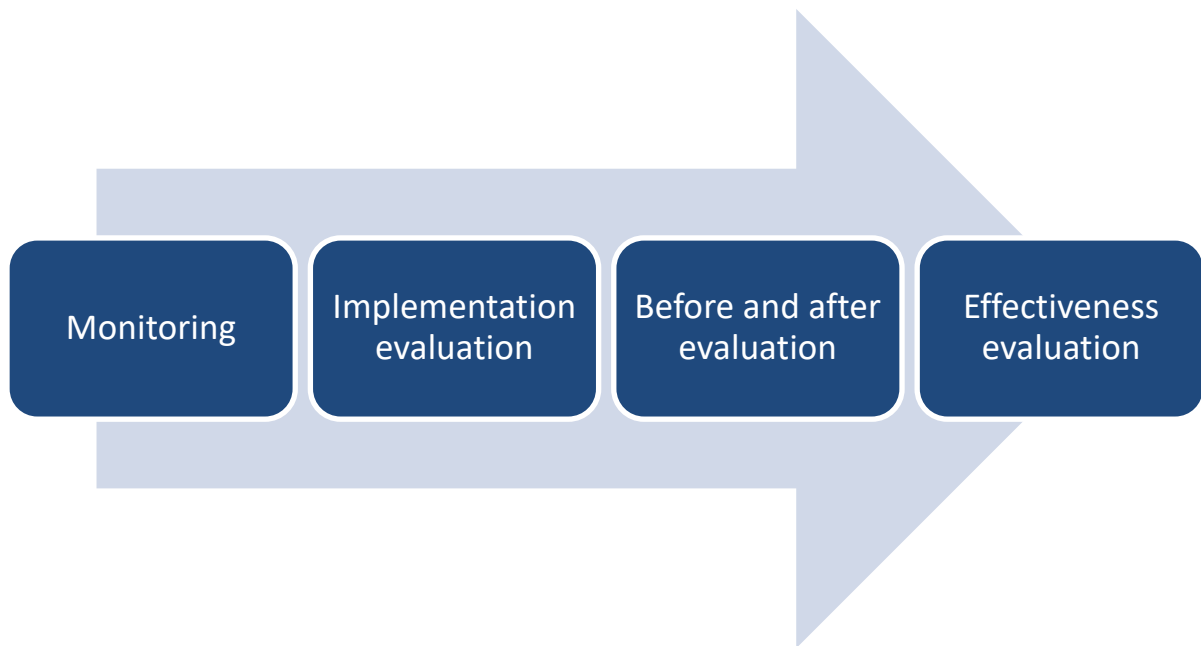# The Better Start Bradford Innovation Hub Framework for Monitoring and Evaluation

Version 1.0–21/09/2017

**Created in Partnership by
Born in Bradford and Better Start Bradford.**

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To be used alongside the 'Service Design of Early Years Interventions: An Operational Guide'

Contents

Introduction

The Better Start Bradford Innovation Hub Framework for Monitoring and Evaluation describes a process for robust, high quality monitoring and evaluation of interventions, and explains what can and cannot be achieved through evaluations. The language used in this document is clarified in the glossary ([Appendix 1](#)).

There is a real lack of quality research evidence for many interventions that are currently being delivered across different organisations in the UK. We believe that one of the main reasons for this is a lack of time and care taken to complete the small and simple steps that are needed to improve the evidence base of any intervention *before* it is ready for a robust evaluation. It is not possible to produce evidence of effect of an intervention quickly or easily and the value of careful feasibility work to improve an interventions' evaluability is crucial.

This guide should be used alongside our ***Operational Guide through the Service Design of Early Years Interventions*** that will ensure that your intervention is developed and designed with the consideration of many of these important steps (e.g. the development of a logic model, identifying appropriate and measurable outcomes and ensuring that the full set of data required to answer evaluation questions is captured and recorded appropriately).

This monitoring and evaluation framework highlights the steps needed to make an intervention ready for evaluation, what each step will be able to tell us, and importantly what it doesn't tell us, as well as what is needed in the intervention design/delivery to produce this output. We also provide an evaluability checklist to aid decisions and set expectations about when an intervention is ready for an effectiveness evaluation.

Summary of monitoring and evaluation categories

The categories, which include monitoring, implementation evaluation, before and after study, effectiveness evaluation and background studies, are organised around the logic model framework common to all interventions. See Appendix 2 for an overview of the monitoring and evaluation categories. The timeline for evaluation will vary for each intervention.

Factors affecting the timeline are likely to include:

- Intervention data availability and quality
- Current evidence base for intervention (EIF ratings, Appendix 3)
- Intervention uptake (affecting sample size)
- Willingness of intervention to collect suitable data
- Resources available to support the evaluation
- Use of reliable, valid and relevant outcome measures

The evaluability checklist (Appendix 4) allows you to assess how the intervention is progressing towards readiness for an effectiveness evaluation, taking into account these and other factors. *We would strongly recommend you involve an academic partner if you want to do effectiveness evaluations*.

Monitoring

Regular assessment of standard intervention data as agreed in the data requirements to facilitate the periodic review of intervention **inputs, activities, and outputs** and identify room for improvement of data quality and suitability.
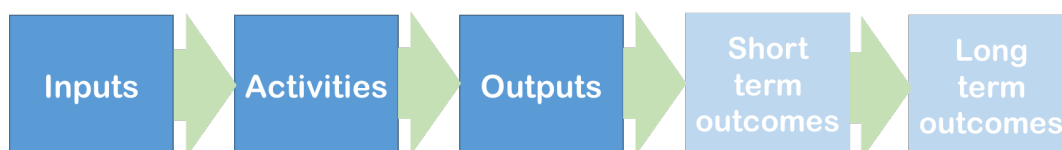
Implementation evaluation

Interpretation of monitoring data and additional data collection where required to **demonstrate the logic model in action**. This will assess intervention implementation, fidelity and participant satisfaction. An evaluability checklist can be used to assess the scope for future evaluations of the intervention (Appendix 4). This evaluation will continue throughout the first commissioning period.
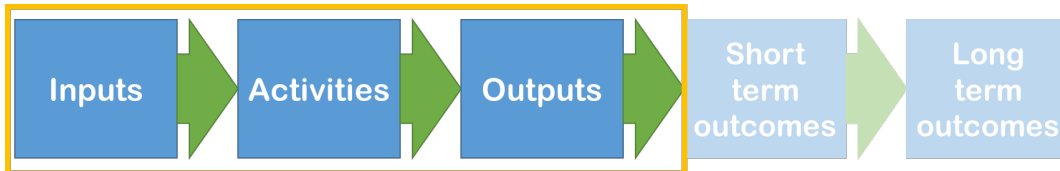
Before and after study

Estimates the **change in outcome(s)** before and after participation in an intervention. These will most likely be short-term outcomes. This may provide EIF level 2 evidence (Appendix 3), and aids the planning of an effectiveness evaluation. Providing requirements are met, this evaluation will be conducted during the first commissioning period.

Effectiveness evaluation

Compares an intervention outcome for those who participated in an intervention with a control group to provide **evidence of effectiveness**. This may results in an EIF level 3 evidence rating (Appendix 3). Evaluations of this type are likely to take place in the 2nd or 3rd round of commissioning.
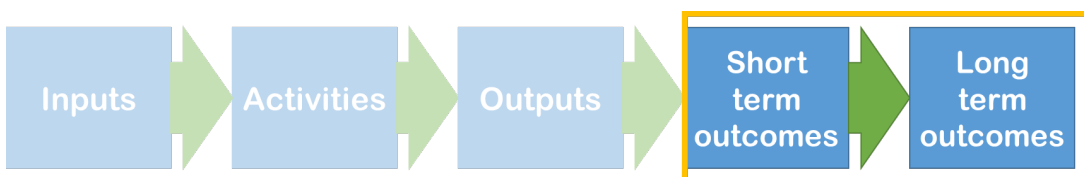
Background studies

These studies provide context to evaluations and inform future evaluations. These studies may focus on specific parts of the logic model, and they make use of different data sources. Examples are; the validation of outcome measures, a study on engagement of hard to reach communities, or a qualitative study to explain limited effectiveness of an intervention for certain ethnic groups.

How to decide on the level of evaluation to undertake

We recommend that all interventions should have on-going monitoring and an implementation evaluation as standard to understand how the intervention is working. This will aid decision making on whether to re-commission or de-commission an intervention at the end of its contract term. We have developed an implementation evaluation framework (Appendix 5) to help you to design this evaluation.

Wherever possible we would also encourage a before and after study to be completed to add to the evidence base of what works. This requires careful consideration of appropriate and valid outcome measures and academic advice / support is recommended.

Whilst we strongly advocate effectiveness evaluations, they require scientific rigour and should not be undertaken without an academic partner.

Monitoring and evaluation categories – objectives and methods

This section describes the monitoring and evaluation categories (overview Appendix 2).

Monitoring

Objectives	To facilitate periodic review of intervention inputs, activities and outputs against progression criteria. Identify need for support around data capture and implementation
Data to be used	Standard intervention data specified in data requirements
Method	Descriptive statistics
Outputs & Timing	Quarterly & annual reports
What it will tell you	Data quality and suitability; informs evaluability assessment Interventions performance against progression criteria
What it won't tell you	Effectiveness of the intervention Why the intervention is or isn't performing as expected
What you need to produce this output	Consent routinely collected System for data capture Agreed progression criteria

Monitoring uses standard intervention data as specified in the data requirements during the service design process. These data are reported quarterly. Monitoring will answer questions such as:

- How many families is an intervention seeing?
- What are the demographics of the families participating in an intervention?
- Is an intervention reaching their target group?

Monitoring data will be reviewed within a framework of progression criteria, which have been agreed separately for each intervention, with the aim of supporting the intervention implementation and data capture, and to inform commissioning decisions.

Implementation Evaluation

Objectives	To assess intervention implementation, fidelity and participant satisfaction To inform future evaluations and assess evaluability
Data to be used **(see Appendix 5)**	Standard intervention data Satisfaction questionnaire data As required: Interviews Focus Groups Observations
Method	Descriptive Statistics Qualitative analysis Evaluability checklist
Outputs & Timing	Report by the end of the contract period
What it will tell us	Interpretation of data on: Reach, recruitment, engagement, adoption Satisfaction Fidelity Explanation of intervention performance What type of future evaluation is possible
What it won't tell us	Effectiveness of the intervention
What we need to produce this output	As per monitoring As required: Access to intervention for observations Access to staff and participants for interviews

The implementation evaluation will provide findings on each intervention during the first commissioning period. This category of evaluation will use monitoring data and standard satisfaction questionnaires, supplemented with other data where required. The framework for identifying what data to collect can be found in Appendix 5. The implementation evaluation may focus on aspects such as intervention content, frequency/ duration of support for each participant, reach, recruitment numbers and procedures, strategies employed to facilitate implementation and participant satisfaction.

This category will answer questions including:

- Is satisfaction of families taking part in the intervention at a high level for women of all ages?
- Are there ways to improve intervention uptake?
- Can a controlled effectiveness evaluation be conducted? When and how?

During the implementation evaluation the evaluability checklist (Appendix 4) should be regularly reviewed. This will highlight issues to be addressed before further evaluation can take place.

Before and after study

Objectives	To provide evidence of change in outcomes before and after participation of an intervention. This may provide EIF level 2 evidence
Data to be used	Validated intervention assessments at start and end of intervention delivery
Method	Basic statistical analyses
Outputs and timing	Report by the end of the contract period
What it will tell you	An estimate of change in outcome(s) after participation in the intervention
What it won't tell you	Effectiveness of the intervention (i.e. whether any change was due to participation in the intervention)
What you need to produce this output	As per monitoring; Logic model and intervention service design are suitably defined. Use of reliable, valid and relevant outcome measures taken before and after participation in the intervention

If an intervention is well-defined, has a logic model and collects outcome data using validated, reliable and appropriate measures, a 'before and after study' could improve the evidence base for such an intervention to an EIF level 2 (Appendix 3).

EIF level 2 evaluation "recognises programmes with preliminary evidence of improving a child outcome, but where an assumption of causal impact cannot be drawn". This has been defined as: Evidence of improving a child outcome from a study involving at least 20 participants, representing 60% of the sample using validated instruments (http://www.eif.org.uk/eif-evidence-standards/).

This compares outcomes for participants at the start and end of an intervention to assess whether there have been changes. Although this does not provide scientific evidence that participation of the intervention causes a change in the outcome, it paves the way for an effectiveness evaluation.

For some interventions a 'before and after study' may be conducted in the first commissioning period, while for others more preparatory work may be required first (through the implementation evaluation).

Effectiveness evaluation

Objectives	To provide evidence of effectiveness of the intervention in relation to short, medium and long-term outcomes This may provide EIF level 3 evidence

Data to be used	Validated baseline and outcome assessments for both participants and controls
	As required:
	    Questionnaires
	    Interviews
	    Focus Groups
	    Observations

Method	Comparison of outcome(s) between intervention participants and control group; may use randomised control trials or quasi-experimental methods
Outputs and timing	Longer-term
What it will tell us	An estimate and interpretation of the strength and direction of the effect of an intervention on an outcome An assessment of the certainty of the results
What it won't tell us	The effect on those not reached Lasting effects beyond the period of follow-up Effects on other outcomes
What we need to produce this output	Intervention EIF rating of 2 Sufficient number of participants An identifiable control group

An effectiveness evaluation will compare intervention participants with a control group. This will enable the analysis of an intervention's effects on short, medium and/or long term outcomes. This category of evaluation usually requires an intervention EIF rating at level 2, as well as a sufficiently large number of participants and a suitable control group. The effectiveness evaluation may raise the level of evidence up to EIF level 3 - Evidence from a least one rigorously conducted evaluation demonstrating a statistically significant positive impact on at least one child outcome.

Analysis of data could employ a range of different approaches, including:

- Randomised Controlled Trials.
- Quasi-experimental approaches to infer causal effects of interventions where data are observational, e.g. using propensity scores.
- Other methods to analyse observational data and take account of differences between the intervention and comparison groups, e.g. linear regression.

The implementation evaluation will be used here to contextualise findings from the effectiveness evaluation. For some interventions, the decision to conduct a full effectiveness evaluation will be made at the start of commissioning. For other interventions, review will be required using the evaluability checklist before effectiveness evaluations are planned. Effectiveness evaluations should not be undertaken without the support of an academic partner.

Background studies

Objectives	To provide context to evaluations and inform future evaluations
Data to be used	As required: Questionnaires Interviews Focus Groups Observations Intervention level data
Method	Depends on study aim and design
Outputs & Timing	Depends on study aim and design
What it will tell us	Depends on study aim and design
What it won't tell us	Depends on study aim and design
What we need to produce this output	As required: Access to intervention for observations Access to staff and participants for interviews Willingness of intervention to facilitate extra study

Additional studies can be completed where required to provide context to evaluation findings and to inform the evaluation of interventions. These may include, for example:

- Validation studies of a measure used by the intervention
- A pilot study of the use of a new approach/tool

Background studies may be reactive; in response to questions arising from intervention delivery and commissioning or from initial evaluations.

Appendix 1: Glossary of terms

All terms are defined in relation to their role in the evaluations.

Term	Definition
Before and after study	A study comparing outcomes for participants at the start and end of their participation in an intervention to estimate change in the outcome(s)
Case study	An in-depth study of an individual unit (e.g. a person or an intervention) to describe, explain, or explore it within a context. May use quantitative or qualitative approaches, or a combination.
Control group	A group of people who did not take part in the intervention, to compare with those who did take part.
Cost effectiveness study	A study that explores the relationship between the costs and effects of an intervention.
EIF rating	The Early Intervention Foundation's review and rating of the strength of evidence that a programme (early life intervention) has a benefit on child outcomes.
EIF level NL2	Not level 2 - No direct evidence about the scale of the impact of the programme at a "preliminary" level.
EIF level 2	Preliminary evidence of improving a child outcome based on a study involving at least 20 participants, representing at least 60% of the sample and using validated instruments.
EIF level 3	Evidence from at least one rigorously conducted evaluation demonstrating a statistically significant positive impact on at least one child outcome.
EIF level 4	Evidence from at least two high quality evaluations (randomised controlled trials or quasi-experimental evaluations) demonstrating a consistently positive impact across populations and environments. This includes RCT/QED evidence of a long-term child outcome lasting a year or longer.
Effect	A change (positive or negative) due to an intervention, which may be intended or unintended.

Effectiveness evaluation	An assessment of the strength and direction of the effect(s) of an intervention on an outcome, and a judgement on the certainty of these findings. It always includes the use of a control group to compare findings between those who did and those who did not participate.
Engagement	Individuals' or groups' level of interest, involvement and participation in an intervention
Evaluability	The extent to which an intervention can be evaluated in a meaningful way. This includes assessment of whether there is a clear logic model, there are defined and measureable outcomes, and there is a comparison group.
Evaluation	An umbrella term for the systematic assessment of the value or significance of an intervention.
Evaluation plan	A short description of the evaluation(s) planned for an intervention including aims, timeline and outputs.
Evaluation protocol	A detailed description of the planned evaluation including aims and context, timeline, outputs, methods of data collection and statistical analysis.
Evidence-based	The systematic use of scientific evidence to inform policy, services or other decisions. Many forms of evidence may be used, including evidence of effectiveness or implementation from scientific studies.
Fidelity	The extent which the key ingredients of an intervention have been delivered as intended (including as often and for as long as planned, by those trained to deliver, in the appropriate context) and received by participants.
Impact	Long term effects of an intervention (either positive or negative), which may be intended or unintended.
Implementation evaluation	An evaluation to explore the extent to which interventions have been delivered as intended and according to the specifications in the service design document, logic model and manual. The evaluation will consider aspects of delivery, fidelity and participants' satisfaction.
Logic model	Logic models are visual ways of presenting the relationships between intervention activities and outcomes. There are different approaches to drawing logic models, but they often typically include intervention inputs, processes and activities, outputs, outcomes and

impacts and the relationships between them.

Monitoring	Regular and systematic collection and review of data and data quality on specific indicators, including intervention inputs, activities, and outputs.
Outcomes	The likely short or medium terms effects of an intervention. Outcomes should be specific and measurable for evaluation to take place.
Outputs	The immediate results of an intervention's activities, e.g. number of workshops run.
Pilot	A pilot study is a small scale preliminary study which may inform the feasibility and design of a future evaluation.
Process evaluation	The MRC defines process evaluation as "a study which aims to understand the functioning of an intervention, by examining implementation, mechanisms of impact, and contextual factors" (MRC, 2015). Explores why an intervention works or does not work, how and in what circumstances (in relation to outcomes).
Quasi-experimental evaluation	A study that estimates the effects of an intervention on outcomes using observational data on families who did and did not take part in combination with quasi-experimental methods (e.g. regression discontinuity, propensity score matching).
Reach	The extent to which people who participate in an intervention are representative of the target population. For a universal intervention this is the extent to which participating people are representative of the local population.
Recruitment	Number of eligible participants who begin an intervention. Enrolment of people in interventions.
Standard intervention data	The data collected by the intervention as specified in the data requirements during the service design process.
Randomised Controlled Trial (RCT)	A study in which people are randomly assigned to 2 (or more) groups to test an intervention or other intervention (e.g. a drug). One group (the experimental group) has the intervention, the other (the control group) has an alternative intervention or no intervention. Outcomes are compared between the two groups to assess the efficacy or effectiveness of the intervention.

Theory of change	An explanation of how the activities of an intervention are expected to lead to the outcomes and impacts. This is used to understand the sequence of changes that are expected to contribute to the outcome.
TwiCs	Trial within Cohorts. To assess the effects of an intervention on outcomes using an experimental design. Eligible cohort members (BiBBS) are randomly allocated to an intervention so that participants and controls can be compared.
Validation study	A study that determines the validity, reliability, and appropriateness of measures.

Appendix 2: Summary of evaluation levels

	Monitoring	Implementation	Before and after	Effectiveness*	Background studies
Objectives	Facilitate periodic review of intervention inputs, activities and outputs against progression criteria. Identify need for support around data capture and implementation	To assess intervention implementation, fidelity and participant satisfaction To inform future evaluations and assess evaluability	To provide evidence of change in outcomes before and after participation of an intervention This may provide EIF level 2 evidence	To provide evidence of effectiveness of the intervention in relation to short, medium and long-term outcomes This may provide EIF level 3 evidence	To provide context to evaluations and inform future evaluations
Data to be used	Standard intervention data specified in data requirements	Standard intervention data Satisfaction Qs *As required:* Interviews / focus groups* Observations*	Standard intervention data	Baseline & Outcome data *As required:* Questionnaires Interviews / focus groups Observations	*As required:* Questionnaires Interviews / focus groups Observations Research data
Method	Descriptive statistics	Descriptive Statistics Qualitative analysis* Evaluability checklist*	Basic statistical analyses	Comparison of outcome(s) between participants and control group; may use randomised control trials or quasi-experimental methods*	Various; depends on study aim and design
Outputs & Timing	Quarterly & annual reports	Report by the end of the contract period	Report by the end of the contract period	Longer-term	Depends on study aim and design

What it will tell us	Data quality and suitability; informs evaluability assessment Interventions performance against progression criteria	Interpretation of data on reach, recruitment, engagement, satisfaction, fidelity to explain intervention performance What future evaluation might be possible*	An estimate of change in outcome(s) after participation in the intervention	An estimate and interpretation of the strength and direction of the effect(s) of an intervention on an outcome Assessment of certainty of the results	Depends on study aim and design
What it won't tell us	Effectiveness of the intervention Why the intervention is or isn't performing as expected	Effectiveness of the intervention	Effectiveness of the intervention	The effect on those not reached Effects beyond the period of follow-up Effects on other outcomes	Depends on study aim and design
What you need to produce this output	Consent routinely collected System for data capture Data sent to IH on time each quarter Agreed progression criteria	As per monitoring *As required:* Access to intervention for observations Access to staff and participants for interviews	As per monitoring Logic model and intervention service design are suitably defined Use of reliable, valid and relevant outcome measures*	Intervention EIF rating of 2 or 3 Sufficient number of participants A control group can be identified	*As required:* Access to intervention for observations Access to staff and participants for interviews Intervention willingness

Appendix 3: EIF levels of evidence

Effectiveness

Evidence from at least two high-quality evaluations* demonstrating positive impacts across populations and environments lasting a year or longer. This evidence may include significant adaptations to meet the needs of different target populations.

Efficacy

Evidence from at least one rigorously conducted evaluation* demonstrating a statistically significant positive impact on at least one child outcome.

Preliminary Evidence

Evidence of improving a child outcome from a study involving at least 20 participants, representing 60% of the sample using validated instruments.

Logic Model

Key elements of the logic model are being confirmed and verified in relation to practice and the underpinning scientific evidence. Testing of impact is underway but evidence of impact at Level 2 not yet achieved.

No Effect

A finding of no effect on measured child outcomes in a high quality impact evaluation.* The next step is to return to the verification and confirmation of the logic model.

4

3

NE

2

NL2

*High quality evaluations do not need to be randomised control trials if a relevant and robust counter-factual can be provided in other ways.

Appendix 4: Evaluability assessment checklist

Intervention design

Aspect of the intervention design	Adequacy for evaluation 🟩 🟧 🟥	Comments
Clarity? Are the short- and long-term impact and outcomes clearly identified and are the proposed steps towards achieving these clearly defined?		Actions to address this issue: Difficulty of addressing issues:
Relevant? Is the intervention objective clearly relevant to the needs of the target group, as identified by any form of situation analysis, baseline study, or other evidence and argument? Is the intended beneficiary group clearly identified?		
Plausible and realistic? Is there a continuous causal chain, connecting the intervening agency with the final impact of concern? Is it likely that the intervention objective could be achieved, given the planned interventions, within the intervention lifespan? Is there evidence from elsewhere that it could be achieved?		
Validity and reliability? Are there valid indicators for each expected event (output, outcome and impact levels)? I.e. will they capture what is expected to happen? Are they reliable indicators? I.e. will observations by different observers find the same thing?		
Agreement? To what extent are different stakeholders holding different views about the intervention objectives and how they will be achieved? How visible are the views of stakeholders who might be expected to have different views?		

Information availability

Aspect of the intervention information availability	Adequacy for evaluation 🟩 🟧 🟥	Comments
Is a complete set of documents available? …relative to what could have been expected? E.g. Intervention proposal, Progress Reports, Evaluations / impact assessments, Commissioned studies		
Do baseline measures exist? If baseline data is not yet available, are there specific plans for how and when baseline data would be collected and how feasible are these? What form does this data come in? Is the sampling process clear? Are the survey instruments available? Are time series data available, for pre-intervention years?		
Is it possible to establish a control group? Is it clear how the control group compares to the intervention group? Is the raw data available or just summary statistics? Are the members of the control group identifiable and potentially contactable? How frequently has data been collected on the status of the control group?		
Is data being collected for all the indicators? Is it with sufficient frequency? Is there significant missing data? Are the measures being used reliable i.e. Is measurement error likely to be a problem?		
Is critical data available, including data on fidelity? Are the intended and actual beneficiaries identifiable? Is there a record of who was involved in what intervention activities and when?		
Do existing M&E systems have the capacity to deliver? Where data is not yet available, do existing staff and systems have the capacity to do so in the future? Are responsibilities, sources and periodicities defined and appropriate? Is the budget adequate?		

Institutional context – practicality and utility

Aspect of the intervention institutional context	Adequacy for evaluation 🟩 🟧 🟥			Comments
Is the timing right? Is there an opportunity for an evaluation to have an influence? Has the intervention accumulated enough implementation experience to enable useful lessons to be extracted? Is the timing appropriate given the situation of the provider and the wider community context?				
What do stakeholders want to know? What evaluation questions are of interest to whom? Are these realistic, given the intervention design and likely data availability? Can they be prioritised? How do people want to see the results used? Is this realistic?				
What sort of evaluation process do stakeholders want? What designs do stakeholders express interest in? Could these work given evaluation the questions of interest and likely information availability, and resources available?				
What ethical issues exist? Are they known or knowable? Are they likely to be manageable? What constraints will they impose?				

This checklist has been extracted from pages 19-23 of the following report, and some revisions to the original version have been made: Davies, R., 2013. Planning Evaluability Assessments: A Synthesis of the Literature with Recommendations. Report of a Study Commissioned by the Department for International Development.

Appendix 5: Implementation Evaluation Framework

Areas to measure	General process questions	Example data source and data collection method
a) Content (Fidelity)	Was the intervention delivered as planned?	Quarterly monitoring data submitted by intervention teams e.g, average staff caseload, content of each course session and adherence to manual (for manualised interventions) Observation of intervention delivery Qualitative interviews with staff/facilitators
b) Frequency/ Duration (Dosage, Dose delivery)	What was the duration and frequency of support received by each family?	Quarterly monitoring data submitted by intervention teams including: Date of each visit/attendance Duration of visit (where applicable)
c) Reach (coverage	What were the demographic characteristics of families referred and took up support from each intervention? What were the characteristics of volunteers (*where intervention delivered by volunteers or peer supporters*)	Quarterly monitoring data submitted by intervention teams including: Sociodemographic background data on parents including ethnicity, gender, language spoken, religion, disability, number, and age of children Reason for referral, referral source Sociodemographic data on volunteers including gender, ethnicity, languages spoken, appointment start and end dates
d) Participant responsiveness	Were parents' satisfied with the support they received and which elements did they find to be most helpful and unhelpful in meeting their needs?	Satisfaction questionnaire for parents Qualitative interviews with parents

Areas to measure	General process questions	Example data source and data collection method
	What proportion of parents accessed further support?	
		Number and type of referrals made to external agencies from quarterly monitoring data submitted by intervention teams
	How did staff/volunteers perceive the impact of the intervention?	
		Interviews or focus groups with staff/volunteers
e) Recruitment	What recruitment procedures were used to engage families and staff?	Quarterly monitoring data submitted by intervention teams including: Dates of all engagement activities Type of activity Setting/location Target audience and anticipated numbers Number of staff/volunteers present Number of parents/children engaged/attended Anticipated number of staff and volunteers recruited and trained
	Did the intervention recruit to target?	Anticipated number of families supported per year Actual number of families supported per year Reasons for drop-out/non-completion/unplanned ending, service declined Interviews with staff/facilitators Analysis of quarterly/ annual reports around the key challenges of implementation and corresponding action plans
	What constituted barriers to maintaining involvement of individuals?	Qualitative interviews with parents Qualitative interviews or focus groups with staff/volunteers
f) Strategies to facilitate implementation	What proportion of parents completed the intervention?	Quarterly monitoring data submitted by intervention teams
	What are the key factors that enabled or were barriers to engagement and	Qualitative interviews with parents Qualitative interviews or focus groups with staff/volunteers

Areas to measure	General process questions	Example data source and data collection method
	completion of intervention?	
g) Context	What factors at political, economical, organisational and work group levels affected the implementation	Qualitative interviews or focus groups with staff/volunteers Analysis of quarterly/annual review reports, meeting minutes and diary of local/national initiatives