MANAGE SOCIAL SERVICES
Monitor and evaluate a social service project

level: 5
credit: 6
planned review date: June 2006
sub-field: Social Services

purpose:
People credited with this unit standard are able to: contribute to planning to monitor and evaluate the social service project; conduct the monitoring and evaluation of the social service project; analyse the information; and report on the monitoring and evaluation of the social service project.

entry information:
Open.

accreditation option:
Evaluation of documentation and visit by NZQA, industry and teaching professional in the same field from another provider.

moderation option:
A centrally established and directed national moderation system has been set up by Community Support Services ITO Limited (Careerforce).

special notes:
People awarded credit in this unit standard are able to explain the application of Te Tiriti o Waitangi in the social services, and are able to apply this competence to the context of assessment for this unit standard (for further clarification, please refer to Unit 7927, Explain the application of Te Tiriti o Waitangi in the social services).
2 Glossary

*Characteristics and needs* may be physical, spiritual, or mental. Characteristics and needs include age and stage of development, culture, disability, gender, health status, language, sexual orientation, and needs for physical comfort, safety, and privacy. *Critical reference group* refers to the group of people whom the project is intended to benefit. The critical reference group comprises the people to whom the monitor/evaluator and service provider must refer to accurately identify the group's needs, opinions, and solutions. The critical reference group may therefore include people who are referred to as service users or participants in other unit standards in the Sub Field: Social Services. Acknowledgements - Wadsworth, Yoland. 1991. *Everyday evaluation on the run*. Melbourne: Action Research Issues Association (Incorporated).

*Monitoring* is a regular (for example daily, weekly, or monthly) process of oversight of a project to ensure it is progressing according to the plan for the project, whereas *evaluation* is a process of measuring the effectiveness of the project against its goals and objectives. *Organisation* refers to a social service provider. A *social service project* is typically a short term, less substantial aspect of a social service provider's work, mandated by and evaluated against the goals and objectives of a social service programme. A project is distinguished from a social service programme, which is a substantial aspect of a service provider's work that is mandated by and evaluated against the kaupapa or mission of the organisation, and usually without a specific endpoint in time.
Stakeholders may include but are not limited to Te Tiriti o Waitangi partners, paid and unpaid staff, the governing body of the organisation, and contractors to the organisation.

The monitoring and evaluation may be conducted by a social service worker within their own organisation, or within another organisation (an internal or external monitoring and evaluation).

Where monitoring and evaluation is to be carried out on a project established by a hapū, iwi, or other Māori social services organisation, evidence is required that the process is based upon the articles of Te Tiriti o Waitangi.

3 This unit standard may be assessed on the basis of evidence of demonstrated performance in the workplace or in simulated work situations designed to draw upon similar performance to that required in work. Evidence is required of competence in one monitoring and evaluation of one social service project.

4 People awarded credit in this unit standard show that their actions are guided and supported by valid theory for social service practice. Evidence is required of social service theory that is derived from authoritative sources, which may include but are not limited to: body of knowledge related to social service work; cultural theory; practice research.
Elements and Performance Criteria

**element 1**
Contribute to planning to monitor and evaluate the social service project.

**performance criteria**

1.1 Contributions to establishment of the terms of reference for monitoring and evaluation are according to negotiation with the organisation and relevant criteria.

Range: relevant criteria - the terms are clearly stated, unambiguous, and concise; the terms include goals and objectives for monitoring and evaluation, identification of people to be involved in monitoring and evaluation, what is to be monitored and evaluated, where it is to occur, when it is to occur, by whom it is to be monitored and evaluated, Te Tiriti o Waitangi obligations and considerations, and criteria for monitoring and evaluation.

1.2 Contributions to planning focus on identifying factors relevant to the monitoring and evaluation process.

Range: factors relevant to the monitoring and evaluation process - the views and interests of the critical reference group and other stakeholders, the characteristics and needs of people involved in the monitoring and evaluation.

1.3 Contributions to planning focus on defining all elements of the monitoring and evaluation plan according to consultation with the critical reference group.

Range: all elements of the monitoring and evaluation plan - method; the work plan for implementation of the monitoring and evaluation; the human, financial, and physical resources required; the nature and scope of information to be gathered and analysed; identification of sources of information.
1.4 Contributions to planning focus on selecting the monitoring and evaluation method according to relevant criteria.

Range: relevant criteria - Te Tiriti o Waitangi and cultural obligations and considerations, the characteristics and needs of the critical reference group and other stakeholders, the nature of the social service project, available resources, time span.

1.5 Contributions to planning focus on identifying all aspects of the monitoring and evaluation method.

Range: identifying all aspects of the monitoring and evaluation method - the purpose and role of the monitor(s) and evaluator(s), protocols and methods for information gathering, recording of information, analysis of information, presentation of report on findings, policy and procedures for responding to any identified issues in project implementation.

1.6 Identification of and communications with proposed informants for the monitoring and evaluation process are in accordance with service provider guidelines.

**element 2**

Conduct the monitoring and evaluation of the social service project.

**performance criteria**

2.1 Materials are prepared to conduct the monitoring and evaluation according to the design of the method in the plan.

2.2 Sources of information in the monitoring and evaluation plan are accessed according to the terms of the plan.
2.3 Information is gathered, organised, recorded, and stored according to the method defined in the plan and service provider guidelines.

**element 3**

Analyse the information.

**performance criteria**

3.1 Information is analysed in accordance with the methods identified in the monitoring and evaluation plan.

3.2 Information is analysed according to the monitoring and evaluation criteria in the plan.

3.3 Conclusions drawn from the analysis are relevant to the goals and objectives for the monitoring and evaluation.

3.4 Any actions taken to respond to any identified issues in project implementation are taken according to the policy and procedures in the plan.

**element 4**

Report on the monitoring and evaluation of the social service project.

**performance criteria**

4.1 The report is a full and accurate report of all matters relevant to the monitoring and evaluation plan.

Range: all matters relevant to the monitoring and evaluation plan - evaluation planning, the purpose and role of the evaluators, implementation of the evaluation plan, evaluation method, information gathered, analysis of information, any identified issues in project implementation, any actions taken, conclusions, recommendations.

4.2 The report is presented in written form or presented orally according to the terms of the plan and criteria established by legislation, ethical practice, and service provider guidelines.
4.3 The report is provided to the critical reference group and other stakeholders according to the plan and any requirements from funders.

4.4 Any amendments to the report are completed in accordance with any provisions in the plan to negotiate the content of the final report with the critical reference group.

4.5 Any amendments to ongoing monitoring and evaluation processes are proposed in accordance with the outcome of reflection on monitoring and evaluation, agreement with the critical reference group where this has been negotiated with the group, and service provider guidelines.

Comments to:

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Wellington 6140

Please Note: Providers must be accredited by the Qualifications Authority before they can offer programmes of education and training assessed against unit standards.

Accredited providers assessing against unit standards must engage with the moderation system that applies to those unit standards. [Please refer to relevant Plan ref: 0222]