Evaluate!

A toolkit for evaluating your project

Evaluation Guide

Evaluate! was created by:

Evaluate! Glossary

Aim
The aim of the project is the change you ultimately want to achieve. The aim is achieved through your project's **objectives**.

Attribution
A means of demonstrating that changes are due to another project or initiative, rather than coincidental.

Audience
The audience is the people with whom you are trying to engage.

Baseline
A measure of the existing conditions at the beginning of a project which will show any changes or improvements that take place.

Charting
A method for analysing **qualitative research** data.

Coding
A way of showing an overall picture of the responses received from quantitative questionnaires by applying a number or letter (code) to each answer given. Coding allows the grouping of responses so that they can be quantified.

Commissioners
Those who commission services and who need to know that their money has been used to good effect.

Data
Information collected for examination and consideration through monitoring and research.

Deadweight
Changes that have taken place that would have happened anyway, without the project.

Displacement
A problem that may have moved elsewhere rather than being solved.

Evaluation
Evaluation determines whether or not objectives of the project have been achieved and identifies ways to improve. It demonstrates that change is actually taking place.

Evaluation strategy
The plan which determines whether or not the objectives of the project have been achieved.

Exit survey
A survey of people undertaken as they leave an event or exhibition etc. Usually conducted by an interviewer rather than a researcher.

Face-to-face interviews
A term used in market and social research to mean structured quantitative surveys conducted face-to-face.

Focus group
A research method that involves a group of usually 6-8 people convened to discuss a particular topic.

Funders
The funders are the people who provide the financial resources that allow the project to be undertaken.

Impacts
The overall difference made by creating changes. Impacts are a comparison of what has happened and what would have happened without the intervention. Impacts are similar to **outcomes** but tend to be a more general measure of the wider effect.

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Inputs
The resources (including money, voluntary time and skills) used by all stakeholders to deliver the project.

In-depth interview
An interview conducted by a researcher using a topic guide, which allows respondents to express themselves in their own way and perhaps raise issues the researcher has not considered.

Indicator
An indicator is a piece of information that can be measured and used to "indicate" or evaluate what has changed or happened as a result of the project. (e.g. an output or outcome)

Intended outcomes
(see **Outcomes**)

Interviewer
A person who conducts interviews following a predetermined questionnaire designed by a researcher.

Key Performance Indicators (or 'KPIs')
Measures of progress towards an **objective**. It is likely that these will be equivalent to **outputs**, or short term **outcomes**.

Milestones
Milestones are interim measures that allow the **monitoring** of whether the project is on track and the **objectives** are being met.

Monetise
The process of expressing **outcomes** in financial terms. For example, jobs can be monetized through net change in participant income.

Monitoring
The collection and recording of information in order to ensure the project is on track.

Observation
Planned watching, recording or analysing of the behaviour of people interacting with the project.

Objectives
Objectives are the measurable activities you undertake and the services you offer to bring the changes stated in your **aim(s)** about.

Outcomes
Outcomes are demonstrable measures of change. They may be those expected when objectives were set ('intended') or not what was anticipated ('unintended'). Outcomes may be short term or broader and long term in nature. **Intended outcomes** are the things that have happened and you hoped would happen when you planned your project. Outcomes tend to be more project-specific than **impacts**.

Outputs
Outputs are the measurable results that you produce as part of an activity e.g. a website, a leaflet, the number of people trained.

Pop-up questionnaire
A questionnaire that literally 'pops-up' on entering a website to collect information about users and usage of the site.

Project
The term project is used as an all-encompassing phrase for talks, shows, hands-on events, websites and the many other ways used to engage general audiences.

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Project management
Project management in this context is simply the procedures through which you ensure that the project is delivered.

Proxy
A financial representation of an **outcome** which may be difficult to directly measure in monetary terms. This means all **outcomes** can be given a financial value. Proxies also allow a financial substitute to be applied to volunteer time.

Qualitative research
Qualitative research helps to understand why people feel as they do or think as they think. With this technique the information is descriptive and is presented in words. This method responds to questions of how, when, who, where and which.

Quantitative research
Quantitative research is used to measure what number of people feel, think or act in a certain way. Information gathered is given as numbers. The best results are gained from setting questions such as how many, how often, how much.

Questionnaire
A structured set of questions calling for a precise response that allows answers from all those who complete it to be added together for analysis.

Quota sampling
A quota sample is one which has been selected to reflect the population of interest to the project.

Researcher
A person who is involved in designing and overseeing a research or evaluation project.

SMART
All objectives should be SMART, which stands for:
- Specific;
- Measurable;
- Achievable;
- Relevant; and
- Time-bound.

Stakeholders
Those who have a legitimate interest in the project, e.g. audiences, **funders** and **commissioners**. Those who affect or are affected by the project.

Sub-contractors
Sub-contractors are people or organisations employed by the project manager to deliver specifically defined products or services.

Summative evaluation
Evaluation at the end of a project that determines whether or not the objectives have been met.

Systematic sampling
A way of taking every 'nth' person who engages with a project. Produces a statistically representative sample.

Topic guide
A list of questions and issues a researcher wants to cover during an in-depth interview or focus group. It enables the interview to retain relevance to the projects objectives.

User
For the purposes of this guide, someone who engages with a project.

A diagram illustrating some of the key terminology of evaluation is shown in Appendix 3.

Evaluate! Introduction to the evaluation guide

This guide sets out a simplified approach to evaluation from start to finish, drawing on best practice particularly in the third sector.

The principles and steps in this guide will be useful to any project seeking to deliver best value – in the private, public and third sectors. Whether they are working with young people or old people, culture or social care, the natural environment or business, all projects or contracted services should evaluate effectiveness.

In a climate of constrained resources, being able to demonstrate that you have met the objectives set and also that you have learned from the process of delivery is becoming increasingly important for funders. Commissioning is changing and the rise of personalised services in social care in particular means that being able to explain clearly and simply to audiences with a range of skills the difference that you can make is becoming imperative.

Evaluation is about assessing performance and delivery of outcomes. It does not deal with the processes by which services are procured and providers selected, important though these are.

Sections 1 and 2 of the Guide explain the nature of evaluation.

Sections 3 and 4 are about how you might go about collecting and analysing the data to understand the impact that your project has made as explained in Section 5.

The process of monetisation of impacts described in Section 6 is considered to be a useful way to help you to be clear about the precise change that your project has made and to demonstrate this in a way that many funders will want. However it may not be essential to go this far for your evaluation, in which case Section 6 can be omitted or you may want to seek help on this aspect.

Section 7 describes a model evaluation report.

The objective of the Guide is that you are encouraged to try evaluation. The Guide is supported by a series of step-by-step cards that seek to break each stage down into digestible pieces.
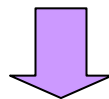
The Evaluation Process

Planning the evaluation

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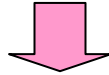
Data gathering

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Data processing

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Identifying project impacts

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Monetising project impacts

↓

Reporting

Evaluate! What is evaluation and what is it for?

1

Evaluating your project or programme is a way of measuring and recording its outcomes and performance so that you can demonstrate your success to funders and improve what you do in the future. It shows whether the ideas and goals of your project have been achieved and how successful this has been.

Evaluation is also a tool to enable you to improve the service or product you deliver as well as the environmental and financial benefits of your project. It is a process that starts right at the beginning, i.e. in the planning stages, of your project. Evaluation then continues right through the project and finishes up with a report at the end that summarises what has been recorded. It includes looking at the quality of the project content, the delivery process and the impact of the project or programme on the participants and/or the wider community.

In order to evaluate your project, you will need to set baselines. To do this you need to measure and record the situation that exists at the beginning of your project that you hope to improve or change. When this has been recorded it will give you a reference point to determine the changes that have taken place.

Evaluation is therefore a learning tool for you, as well as a way of demonstrating what your project has achieved to funders and other stakeholders.

Here is an example of the potential benefits of evaluation:

In 2011 a small project that enabled people with learning disabilities to do artwork in an orchard was evaluated. As a result of the evaluation:

- Service users and their carers were directly involved in the process of identifying outcomes
- The commissioners received a clear demonstration of the benefits, were fully engaged in the project and changed commissioning patterns as a result
- Observation of behaviour outcomes allowed the needs of service users to be more directly assessed
- The project received further funding

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1 Evaluate! What is evaluation and what is it for?

In order to show your funder or commissioner the true quality of your work and the full value that your project has delivered with the resources that they have provided, you need to be able to demonstrate a record of the impact(s) of what you have done. You need to be able to show why something has changed as a result of your work and how you might do things differently in future to improve delivery.

The cost and time for evaluation should be built into the project budget. The cost will vary according to the size and scope of the project, and the requirements of the funder. Generally speaking, the smaller the project the larger the proportion of the budget will be spent on evaluation.

Many organisations think they are carrying out project **evaluation** `when they are actually undertaking **monitoring**. These two things are distinct from each other. The evaluation process incorporates a degree of monitoring.
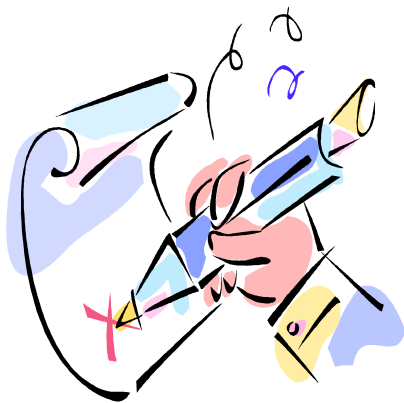
Definitions:

- **Monitoring** – Counting/measuring project outputs. Ensuring project is on track.
- **Evaluation** – Identifying impact(s) of project and ensuring it is fit for purpose/appropriately designed to achieve maximum impact.

There are three roles for your evaluation:

- To support the development of your project and/or organisation.
- To ensure you do it even better next time.
- To assess the final impact(s) of your project.

The objectives of project evaluation should be to:

- Establish whether the aims and objectives of a project or programme have been met.
- Identify what (if anything) has changed as a result of the project or programme (this is sometimes called summative evaluation).
- Identify whether there have been unintended outcomes and what these were and support the development of a project as part of the research and development process.
- Identify how the project could have been more effective or could develop in the future.

There are three key stages to the evaluation process. All these stages are important if you are to get the most from your evaluation, although most attention is paid to summative evaluation:

1. Evaluation planning – is a process you carry out when designing your project.
You should be planning for evaluation during the development of the project to test ideas and concepts on representatives of the intended stakeholders. Sometimes this is referred to as market research. Of course this means that you will need to identify the project's main stakeholders i.e. **who or what is going to be affected by the project** or will affect the project. Stakeholders might include funders, participants, families and friends, neighbours, audiences and local businesses. Note also that stakeholders are not only groups of people – they could include the environment or even a building. (This idea might seem a little strange at first!). Engaging with the stakeholders is fundamental to successful project outcomes and effective evaluation Some funders (eg the Lottery) will specify what they need you to do and the form that the evaluation must take. Nevertheless the principles in this Guide will stand you in good stead. Evaluation planning will help project managers to assess how they can best engage their target audience.

Depending on the size and nature of your project, project staff may need to test things out with sample or pilot groups several times during the development of the project. This might be done as a matter of course but as it is a key part of the evaluation strategy, you need to make sure you record what has been done and what you have found out as a result.

2. Evaluation of processes – this is carried out during your project activity
You should be evaluating the processes of how the project is managed and delivered. This will help you to see what lessons can be learned to make delivery even better in the future. This information is also useful to colleagues and ideally should be shared with the wider community so that they can learn from these experiences.

3. Summative evaluation – this *sums* up the project so is usually carried out at the end of your project although an "interim" report is sometimes needed.
Summative evaluation is the stage of evaluation that people are most familiar with. It looks at the project outcomes and measures what, if any, impact you have had on the participants and beyond. It is your final project report and should explain and analyse what you did, what the resulting impacts were and any lessons learned for the future.

Evaluate! Planning your evaluation

Planning your evaluation should take place at the same time as planning your project because this is the stage at which you will need to decide what it is that you want to show you have achieved as a result of your work. If you are using an external evaluator, this stage might actually be undertaken by the project staff as the evaluator is only likely to be appointed after funding has been confirmed. If this is the case, you need to carefully record everything that you do in this "formative" stage so that the evaluator can get up to speed quickly when they begin their work. Quite often planning a project's evaluation is forgotten in the enthusiasm to get the project started. If you are starting your evaluation mid-way through or at the end of your project, don't worry, it is still possible to evaluate your project, although the evaluation might be less effective than one that was started at the beginning of your project.

Some important Definitions

Aims, objectives, outcomes and impacts
Aims, objectives and outcomes or impacts are always linked but are often confused with each other. They are however, quite distinct:

Aims are the changes you hope to ultimately achieve as a result of your work

Objectives are the measurable activities you undertake and the services you offer to bring about the changes stated in your aims.

Outcomes are demonstrable measures of change. Outcomes may be short term or broader and long term in nature. Outcomes tend to be more project-specific than *impacts*.

Impacts are the overall difference made by creating changes. Impacts are a comparison of what has happened and what would have happened without the intervention. Impacts are similar to *outcomes* but tend to be a more general measure of the wider effect.

Identifying your aims
The first thing you need to do is to clarify the project aim(s), i.e. what you want to achieve as a result of your project. You might have just one aim or an *overall* aim and two or three *specific* aims. Once you have determined your project aim(s) you need to set its objectives. Objectives are the things you need to do to achieve your aim(s).

Evaluate! Planning your evaluation
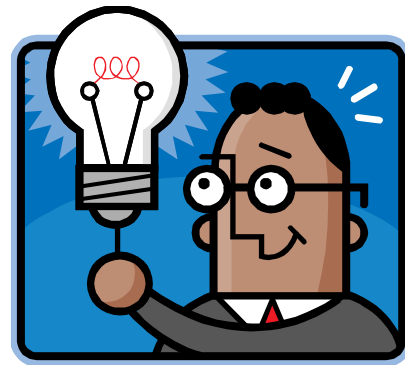
Setting your objectives

Your objectives are the things against which you will be evaluating your project and against which other people (including funders) will be assessing you. Setting appropriate objectives requires careful consideration. At the project application stage funders or commissioners will want to see that you're going to give them good value for their money but you need to make sure the objectives you set are achievable. Good objective setting helps you think through not just the evaluation strategy, but the whole process of running the project.

Your objectives need to be relevant to your aim(s)

You need to make your objectives SMART:

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound

Each objective should be all of these. A good idea is to look at your aims and try to define the key things that will need to be done in order to achieve the project aims.

Then you need to make sure each of the objectives is SMART, i.e. check if it is specific, then check it can be measured and so on. You might find that the wording of your objectives needs to be changed in order to make them SMART.

Considering each element of SMART in turn provides you with a process for establishing whether or not an objective is appropriate.
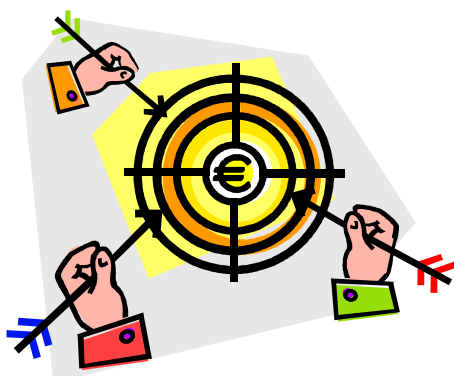
Evaluate! Planning your evaluation

Here is an example of the aims and objectives identified by an Employment Project that wanted to focus on its outcomes:

The overall aim of the project:

- To improve the lives of people in Hereford who are long term homeless

Within its *overall aim* it identified the following *specific aims*.

Specific aims:

- To increase users' lifestyle stability
- To increase users skills
- To increase users confidence and motivation
- To enable users to find employment

Once it had agreed its aims, the project identified *the objectives* or the activities/services it was providing to achieve the aims:

Objectives:

- To provide information and advice on housing and resettlement
- To provide training on core job skills and job search skills
- To offer supported work placements
- To support users in applying for jobs
- To facilitate a support group for users

When setting your objectives at this early stage of your project it is worth noting that each local authority will have a strategy which sets out its long term vision for the area. What the document is actually called will be different in different local authorities but will set out the local priorities that have been negotiated between the council and other service providers (like the NHS, the police, charities and community organisations, the Government and the Job Centre). This means each area can focus on what is important to improve the quality of life for their local residents.
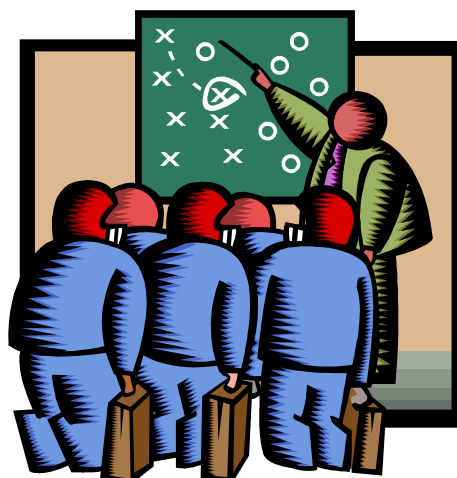
Evaluate! Planning your evaluation

The following is a brief example of the very varied priorities that may be targeted by local councils.

- Ensure children and young people are healthy and have healthy lifestyles.
- Reduce crime, the harm caused by illegal drugs and to reassure the public reducing the fear of crime. To empower local people to have a greater voice and influence over local
- Empower local people to have a greater voice and influence over local decision making and the delivery of services.
- Increase the number of affordable homes
- Reduce the percentage of waste going to landfill
- Create more and better-paid employment.

If you consider using the local priorities set out in the local strategy when you are setting your objectives, your final report can show funders and local authorities how you have helped meet local targets. This can make it easier to get funding for future projects and so help your organisation's financial sustainability.

Outcomes

At the beginning of your project, you need to carefully consider the outcomes you're aiming to achieve. Ideally the desired outcomes should be decided in consultation with the stakeholders in the project. To be able to evaluate whether outcomes have been delivered they need to be demonstrable and you will need to agree with stakeholders the information that will be required to measure them. When designing your project you also need to think about the realistic level of outcome that you can make and when this is expected to happen, and how you will identify that outcome. The project is likely to be expected to deliver short term outcomes (such as participants eating more healthily). However it will stand you in good stead with funders and commissioners if you can couch these in terms of the longer term outcomes for your community or the local area to which your project will contribute (such as a healthier and happier population).

Evaluate! Planning your evaluation

Sometimes funders will be looking to link project payments to results in terms of outcomes or defined outputs (or results), so it is even more important to consider them carefully and agree short term outcomes that you can deliver. You also need to consider two types of outcome – the outcome you hope to achieve when planning your project and the unintended outcomes that also occurred as a result of your project. An unintended outcome is a change that happens that you weren't expecting. For example, a project established to promote healthy eating might unexpectedly improve community cohesion if people enjoy coming to the meetings.

Along the way, the project also needs to keep track of the **inputs** to the project (in terms of the resources and time spent by stakeholders) and the **outputs** which are the results that are produced such as numbers of people attending courses. Often outputs are measured as **key performance indicators**.
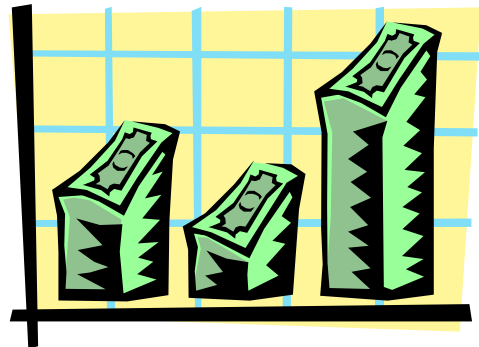
Limitations of the evaluation

It's also important to think about the limitations of your evaluation – there may well be some areas of your project that you are not able to evaluate effectively or where this is not practical. This is fine – you just need to be aware where these boundaries are and explain why this area of your project cannot be evaluated effectively.

Limited availability of funds might mean that you cannot fully evaluate your project. In this case providing only the monitoring aspects of evaluation might be your only option.

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Gathering the necessary data.

Data must be collected about the situation before the project, during the activity and after the activity has taken place to allow outputs and short term outcomes to be assessed. This section considers some of the ways of gathering the data you need.

Baselines
If you are using an external evaluator this is the point where they are likely to begin.
As you need to measure the improvement that has taken place by the end of your project it is vital that you have a *baseline* to work from. This means that you must know what the existing situation is at the very start of your project. It is only by having this information that any measure of success can be made and any changes as a result of your project can be recognised (i.e. impacts).

Another way of measuring the impact of your project might be to compare with what happened somewhere else where the project wasn't running, using a **control group** (for example the change in behaviour of a group of similar people not involved with your project over the same time frame)

Methods of data gathering.
There are two types of data or information that need to be gathered for your project evaluation: *quantitative* data and *qualitative* data.

Quantitative data is, as it suggests, numerical and explains "how many", "how much" and "what percentage" etc. This is where you ask questions with answers based around numbers.

Qualitative information is about the substance, quality and nature of the project impacts.

The table below illustrates this:

Quantitative	Qualitative
How many participants liked the project	What participants liked or disliked about the project
How many people began/finished the project	How the project could be improved
How many people took part in discussions	What could be changed or added to the project
How many participants answered yes or no to particular questions	How project activities influenced their actions / behaviour
How people rated the surroundings or venue	What participants liked or disliked about the venue and what they suggest for future sessions

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Evaluate! Data gathering

Working through the process of developing SMART objectives should have helped you start thinking about how you can collect the information you will need to do your evaluation. The basic tools and techniques you will use come from social and market research methods. Workers in these fields use certain terms with a common understanding of what they mean and this guide will use the same language.

Evaluation uses a "combination" of methods and these include:

- Questionnaires
- Interviews
- Observational research
- Record keeping
- Use of visitors books
- Assessment of media impact

These methods can be used to obtain qualitative and quantitative information.

These methods are explained in more detail below.

Quantitative data gathering
Quantitative information can be gathered in different ways. For example you might use:

- Questionnaires distributed to participants at the end of the project or by post some time afterwards.
- Questionnaires via e-mail or Internet
- Face-to-face interviews
- Telephone interviews
- Existing data collected by government agencies or others

For courses and events a useful method of gathering data is to distribute paper questionnaires to participants to complete and return at the end of the event. A face-to-face interview with a sample of attendees at the event is another option, which will produce more in depth, qualitative information. These tools are great for gathering instant feedback but you may want a response that needs more considered thought or reflection, in which case posting out paper questionnaires, using telephone or e-mail follow-ups, and conducting face to face interviews or focus groups at a later date could be useful.

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Evaluate! Data gathering

Note that when gathering *quantitative* information it is important that every respondent is asked the same questions in the same way so that the answers can be added together. You should try to get as wide a representation of the project participants as possible.

In order to gather the information you need to assess your outputs and outcomes, you will probably use a combination of these methods. You'll need to consider how much time and/or money you can spend gathering the data. Getting project participants to complete questionnaires at the end of a session can be a quick and low cost way of obtaining quantitative information. However this method may not probe deeply enough for some aspects of evaluation. Using the internet or e-mail to conduct surveys has the lowest cost but of course this could restrict your audience to those with internet access. It is also worth noting that electronic (internet and email) and postal surveys tend to have a low response rate. To run a face to face interview will take around 45 minutes and therefore it is the most expensive method to use. It can be very useful for obtaining both quantitative and especially qualitative information as it offers participants the opportunity to more fully express their views. Telephone interviewing is less expensive than face to face but still has costs

attached. A telephone interview is likely to be less in depth than a face to face interview and each call usually lasts for around 15 minutes.
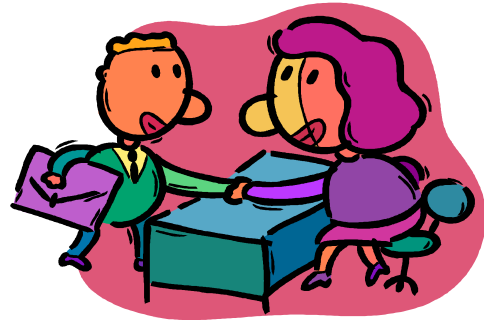
Qualitative data gathering

Qualitative information enables you to address the deeper issues, such as why people did or didn't like a project, why they felt it was good or bad and what they think could be changed to improve things in the future. Qualitative information is usually gathered in individual, one-to-one, often in-depth interviews (face to face or telephone) and group discussions or focus groups; preferably conducted by someone who has been involved in the whole process of the evaluation and who therefore has a deep understanding of the objectives of the project. These interviews/discussions are likely to be conducted by one of your project team and because qualitative methods allow you to interact directly with 'users' you can test out ideas that you form during the evaluation process. You'll find that you don't need to talk to very many people before you stop getting new information therefore the audience

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samples tend to be small. People should be selected to give you a cross section of your audience rather than a random sample.

By using group discussion, focus groups and individual interviews you will be able to record the in depth opinions of participants, which may cover areas you hadn't thought of and could be very useful to add to your survey.

It is useful to ask how they found surroundings at the venue, whether they enjoyed the refreshments and environment generally.

The best time to get these reactions is whilst the project is running but it is still effective to survey after they have had time to reflect on what their experience was. All of this information goes towards improving your next project and identifying things to change, improve or discard.

When conducting focus groups or interviews you should have a guide to the item(s) you want discussed. This directs the flow of the issues you want to discuss but allows the participants to raise topics which can then be addressed or explored further. Participants can express themselves in their own words whilst facilitated by you and this allows you to hear why people think what they think or do what they do. This is different from a quantitative survey

where there is a fixed pattern to follow in a questionnaire.

Key methods of data gathering

Questionnaires

A self completion questionnaire on paper is very effective at small events or courses where you can distribute the questionnaires to the audience which they can fill in at the time and hand in as they leave the event. Questionnaires should have the option to be anonymous to ensure that people are able to give honest answers.

When composing a questionnaire it is important to take into account the nature of your audience and what you want the questionnaire to reveal. In this way you will have more accurate responses and you will be able to demonstrate the extent to which the project has achieved its aims and objectives. You may have people who do not use English as their first language or you could have a young audience. It is wise to be aware of the baseline literacy level of participants.

It is a good idea to have a set of questions that require an exact response so that when the answers are collated your findings are clear. You can create scales to identify the responses (see "What to do with the data you have gathered" section).

Evaluate! Data gathering

The most commonly used form of rating system is known as the Likert Scale. The answer format of a typical five-level Likert rated question is:

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

It is a good idea to include some qualitative questions such as "What went well?" or "How might we have improved...?" You should restrict your questionnaire to one or two pages so that people are not put off completing it. You need to make the questionnaire as clear and concise as possible to maximise the number of responses you get and to obtain as much information as you can because the higher the response rate the more representative your results will be and the qualitative information obtained will help identify the strengths and weaknesses of the project.

Telephone and face to face interviews

Telephone surveys are useful as a follow up interview to your event. There are a number of benefits in using telephone interviewing. If the interviewees have not understood a question in the original questionnaire, this can be repeated, you can also offer access to non English speaking communities. You

also have the opportunity to chat briefly with each person and record the comments they make.

Sometimes people will give more reflective answers if they have had time to think about the experience of participating in your project. A telephone interview should be fairly short; around 10 – 15 minutes.
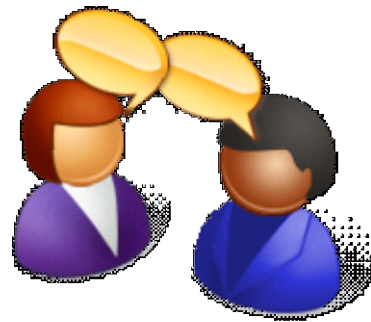
Face to face interviews allow you a more in depth discussion. This means you can be more certain that your interviewee has fully understood the questions. Expanding your interview with cards or pictures can help people respond in some cases. A Face to face interview can allow you to explore certain issues and aspects of your project delivery in some depth. These interviews tend to be longer that telephone interviews and can take up to 45 minutes. As with telephone interviewing, you can also access the views of non English speaking people by using interviewers with the necessary language skills.

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Whichever form of questioning you use it is always important to look at the content, the layout and the structure of your questionnaire so that your interviewee feels comfortable this way you will achieve the best results.

Confidentiality and data protection

You must keep the identity of individual respondents confidential unless you have their permission, this is particularly important with children and teenagers, where a parent or carer's permission will also be needed. It must be made clear to all participants if you intend to use any results that could identify individuals for publication or to build a database. For further information you can refer to:

The Data Commissioner, at
www.informationcommissioner.gov.uk

The Market Research Society, at
www.mrs.org.uk

Observational data gathering

Observation involves watching, recording and analysing behaviour as it happens in a 'natural' setting. For example you might observe the level of engagement of participants in an activity. Observation is also particularly useful for understanding how people use websites and CD ROMS or flow through an exhibition, as well as to consider how to get more people to more actively

participate in activities or discussions. Observation is most often used to obtain qualitative data but can also be used to gather quantitative information.

Observation throughout the evaluation process allows you to:

- see how people react to specific tasks;
- see how people behave and relate in context;
- pick out the important issues which will be followed up at further interviews;
- build relationships with participants which will benefit follow up interviews;
- remove the element of bias that self reporting is prone to;

You can observe and make general notes on how individuals engage with your project but you can also use observational methods to compare how people interact together and influence each other (group dynamics) at events. This is done by having a structure against which to record details in which you are interested, for example:

- the order in which web pages are accessed
- the number and type of participants at an event
- the level of input to discussions
- the types of people who actively participate
- the main subjects of concern

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Evaluate! Data gathering

Visitors' book

If you provide a visitors book at an event or exhibition, it will enable you to note visitors' thoughts and get feedback on your project. However only those with a high level of interest are likely to make comments. So the comments, while helpful in the development of your project and/or future projects, will not be representative of the whole audience or your initial target audience.

Beneficiary and project staff logs

By keeping a record of their thoughts with notes made during the process of a project, participants can allow you insight to how they have viewed the outcome of your project and their overall thoughts. You could also keep your own log which would

record times, dates and other material relevant to your evaluation. You can then easily see if there are things you would like to change or just do differently for future projects.
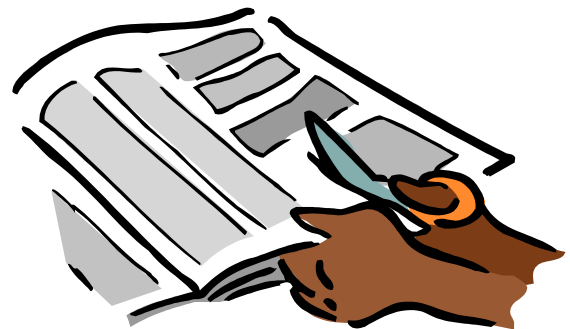
Media impact

You may decide to set press coverage as one the objectives of your project. You need to think carefully about what you are trying to measure here. You can estimate the readership of a magazine or newspaper but there is no easy way of knowing how many people actually read it. So you need to be clear about the limitations of measuring media impact.

Evaluate! Data processing

What to do with the data you have gathered?

Processing quantitative data

Coding
If you are doing a large project or have a great deal of information to analyse you may need to code your quantitative data in order to prepare it for analysis. Most of your data collection will have come from surveys you have carried out therefore a value (code) can be given to each answer. If each answer has a number given to it then you can build an overall picture of the survey result. See example below:

Question	Response
How often is your recycling collected?	You can give a number to each of the answer options below: (1) Once a week (2) Twice a week (3) Once a month (4) Not collected

You can then report how many people have "once weekly" collection using your codes. You'll need to ensure that every question has a code of this type to allow a correct summary.

There may be occasions where a respondent has mistakenly marked two answers, you need to have in place a rule on how to deal with this before you start coding so that if you are part of a team you are all following the same system.

The following table will show you how you can summarise the information you have coded.

ID	Q1	Q2	Q3	Q4
1				
2				
3				
4				

The column headed ID refers to each respondent to the survey. Q1, Q2 etc refer to the survey question number. One row of the table will be filled as the data from each question are entered. You can then easily analyse how many 1s, 2s etc that you have. Using a spreadsheet (E.g. Excel) can be very helpful for recording and collating this information.

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Processing qualitative data

Qualitative data is gathered by recording conversations and by observation. Recording may be literal through audio or video (in either case permission should be sought from the respondents before recording starts) or by note-taking to record key points. Recording focus groups and interviews allows you to concentrate on responding to and observing the interviewee(s). Using note taking can sometimes lose the thrust and depth of the conversation.
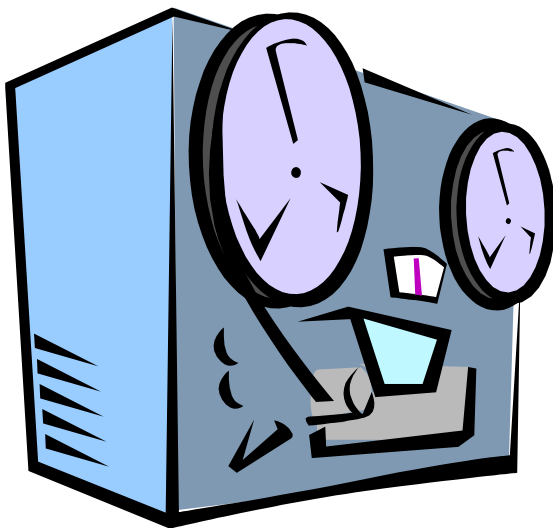
You will be looking at qualitative data to see what issues emerge from the information recorded. The following is a guide:

- main themes and issues (across a variety of individuals or groups)
- ideas from the audience that will support the project development
- keeping track of individual views and finding out why they change
- quotes that illustrate views which can be used in the final report

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Evaluate! Identifying impacts

This is where you ask what has changed as a result of your project activities. The impact of your project can be immediate and/or long term but the initial response is particularly useful if you do not have the opportunity to follow up participants at a later date.

In bringing together the results of your project it is important that you keep in mind who will be interested in the findings and therefore who is the audience for your evaluation. Of course there may be several audiences, including commissioners, other funders and participants. They are likely to want to know different things about the project.

From your qualitative data, you can find out if the participants enjoyed the project and why. You can also identify what they found most useful, what they would change and for what reasons etc. This gives an overall view and will help in future projects you run. It is often helpful to collect *stories* and photographs of people and events during the project that will help to bring the final report to life.

To identify the non financial impacts of your project you will have to look at the baseline information that you recorded at the start of your project. This, in conjunction with the objectives you set will show what the impact has been.

You will have by now gathered the data in quantitative and qualitative form and should ideally have a spreadsheet to show what your information proves.

For example if your project was designed to increase the pass level of exams for sixteen year olds, your baseline will tell you what pass rate you started with. After the project has run you will be able to see whether your project has increased the pass level rate by looking at the collated data. Alternatively it may be that behaviour has changed. For example, a project might have resulted in a number of long term unemployed people getting into work.

Depending on the aims and objectives set at the start of your project there are many different types of non financial impact to consider.

5 Evaluate! Identifying impacts

There is an increasing interest to funders and commissioners in the environmental impacts of projects. Your project does not need to be an environmentally focused project in order to make environmental impacts. Environmental improvements are usually best recorded as quantitative information, although the final impact is not always quantifiable. The achievement could be that you have increased re-use or recycling in your project activities or perhaps you took steps to decrease carbon dioxide emission that occurred as a result of your work. Examples of how you increased recycling could be that you used refillable inks and recycled paper and a decrease in the number of miles travelled by project staff through car sharing could provide evidence of reduced carbon dioxide emissions This all supports more sustainable living and therefore a better quality of life for the community, which can then promote the well being impacts of your project etc. This sort of information can also show how you helped towards achieving local targets.

Some of these impacts might require follow on work and monitoring to gain the information you need. It may be that behaviour has changed but it will often take longer to see if this is a long term change and not just a temporary reaction to the project itself. To identify these impacts will need ongoing contact and therefore will have a cost attached, which would need to be factored into the evaluation budget.
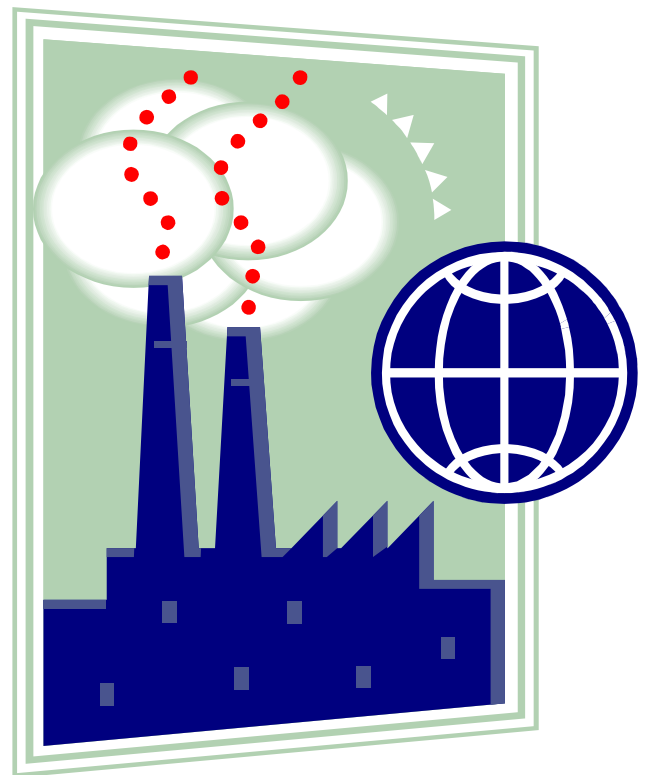
Evaluate! Monetising project impacts

Measuring the financial outcomes of your project

At first the area of financial outcomes may seem quite daunting, but fortunately it is not as complicated or difficult as it sounds.

Identifying the financial benefits of your project can be a very useful way of showing commissioners and funders the true worth of your work. It can clearly show the added value of their investment. If a commissioner or funder is able to see how every pound they invest is in effect multiplied by your project, they are much more likely to fund future work that you do.

It might be that you really don't need to measure the financial outcomes of your project or that the scope of the project is too small to warrant the cost of going through this process. In this case you might choose not to complete this stage of the evaluation. **However the measurement of the financial benefits of your project is highly recommended** not least because the process of monetisation forces you to think very clearly about the outcomes delivered.

Some types of projects have more obvious financial outcomes than others. For example if your project is related to health then its financial benefits are likely to be relatively easy to identify and measure. If your project was, say, looking to improve

the health of a particular group of people, then one of the outcomes could be that their participants make fewer GP visits. These costs are available from the NHS and the savings made are a financial impact of your project.

Monetising your project outcomes

The process of expressing project outcomes in financial terms is called monetisation.

There are several different approaches to monetisation of the outcomes of a project, but we are following an approach called Social Return on Investment (or "SROI").

In this guide we have set out the basic approach to follow to allow you to monetise your project impacts in simple terms. Here are some underlying principles when completing the monetisation:

- It is sensible to concentrate on those changes that really matter, rather than spending a lot of time trying to monetise every small change.

- You need to record the assumptions you will have had to make in completing the monetisation so that these can be included in your report.

Evaluate! Monetising project impacts

There are different stages to monetisation and you will need to decide for your evaluation whether to do all three stages or to only complete part 1, or parts 1 and 2. This may depend uoon the importance being attached to the financial outcomes.

Appendix 1 shows a range of examples of how to monetise project outcomes, linked to LAA priorities.

Monetising your project, part 1:

When you have identified the outcomes of the project for each stakeholder, you need to identify a way of giving a financial **value for all of those that are monetisable.**

Sometimes the financial measure will be the direct cost saved by someone not having to do something; such as sharing a car and saving the cost of the petrol. For other outcomes there might not be obvious direct cost saved by the participant but associated values might be available.

So for example in order to give a value to a project outcome where a

participant did not have to visit their GP as often, national or local data will be available about the average cost of a GP visit even though the participant doesn't have to directly pay for the GP visit. By reducing the number of GP visits, there will be a measurable cost saving. If the cost of a GP visit is £35 and the project saves ten GP visits, the financial value will be 10 visits x £35 per visit = £350 saved. This type of information is available in the Unit Cost of Health Care published annually by the Personal Social Services Research Unit.

However sometimes you might not be able to find the financial data you need or it might be difficult to accurately measure the financial benefits. If this is the case, you may need to use what is known as a *proxy* for your financial measure.

The concept of proxies is rather a difficult area when you first encounter it but will seem simpler when you look at the examples that are highlighted in Appendix 1.

Proxies are an approximation (or a representation of the outcomes in monetary terms) rather than an absolute financial value and it should be clear in your evaluation report how you arrived at the proxy values.

For example if a project has an outcome for people to take more exercise, a measure of the financial value of the exercise might be to

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attach an estimated value to each hour spent exercising. This could for example be the national minimum wage (currently £6.08 per hour). Alternatively you might use the cost of gym membership even though a gym wasn't actually used.

The value of the outcome is the quantity measured times the financial cost of the outcome (which may be a proxy).

There is an extensive database of proxies used by other projects maintained by the SROI Network at www.wikivois.org

Monetising your project, part 2:

Now that you have attached a monetary value to your outcomes you need to decide if any part of each outcome is due to other factors and not to your project. This will be made up of the total of the following percentages:

- Estimate **what percentage of the changes you have identified would have happened** even without this or any other project (this is called "deadweight").

- Estimate **what percentage of these changes was due to someone else** – another project or initiative (this is called "attribution").

- Estimate **what percentage of the changes has simply happened because a problem has moved elsewhere** as a result of your project – so is not really a benefit (this is called "displacement").

When you calculate the financial impacts of your project, you should make sure you take these other factors into consideration so that you don't over claim the benefits arising from your project.

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6 Evaluate! Monetising project impacts

Example:

In an alcohol misuse reduction programme a number of changes could be recorded that show reduced misuse. Some of these could be due to the work of the project itself. However some of these changes could be due to:

- Death of alcohol misusers in the area or people who simply managed to abstain from misuse through their own efforts.

- People benefiting from another local programme, e.g. AA or national advertising campaign.

- Movement of alcohol misusers to a new housing scheme in another area, if your project has been involved in some way.

The **monetised outcomes of the project** are the financial values of each outcome from Stage 1 minus the percentage from Stage 2. This is your estimate of the real financial impact of your project taking into account everything else that is going on.

Monetising your project, part 3:

This stage of monetisation is important where projects or their impacts span several years and you want to take this into in account to properly measure your financial outcomes. The way to do this is explained in Appendix 2.

Summarising the financial outcomes

To show the full financial picture for your project you will need to compare the total monetised outcomes of the project to the input to the project. The total financial input of the project will consist of:

- the money (grants or commission) received from funders

- any money put in from your own organisation's resources

- the "proxy" values of volunteer time or goods and services donated (proxy values for volunteer time can be obtained from your local Voluntary Sector Support organisation)

Evaluate! Monetising project impacts

To illustrate the financial added value of your project outcomes, you can compare the monetised impact of the project to the total inputs to show that for the investment of an input of £X your project has generated an impact of £Y.

Then by dividing the project's financial impact (£Y) by the total investment of £X you can show how many £s of impact have been generated by each £1 invested.

In the case where a project is funded by two or more funders, this financial investment versus financial impact can be broken down to show how each individual investment has been "multiplied" through the project into a much larger financial impact – through match funding, through volunteered time and resources, and through the financial added value impact delivered by your project.

Please be aware that this Guide provides an overview of an approach to monetisation which is consistent with SROI.

Further information about SROI; the principles upon which it is based and how it can be used can be found on the SROI Network website www.thesroinetwork.org.

For some projects, a more detailed and formalised approach to the calculation of SROI may be required, particularly if the evaluation report needs to receive external assurance. If this is the case, you should look at the methodology explained in "A Guide to Social Investment" which is available at: http://www.thesroinetwork.org/publications/doc_details/241-a-guide-to-social-return-on-investment-2012

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Evaluate! The report

Writing your evaluation report

Your report should be structured around the objectives your evaluation set out to address in your project. Monitoring information should also have a role in your final report. For the sections that relate to your project objectives, try to turn the objective into a question or several questions. Then assess all the information you have from both monitoring and the evaluation and allocate each piece of information to a section of the report. If you have information that doesn't add anything, ignore it. Don't feel you have to report every piece of detail. It can be useful to have short 'conclusions' at the end of each main section that sums up the main points from the section. The use of charts to illustrate numerical data, which can easily be derived if you have your data in a spreadsheet such as Excel, will help you and the reader identify highs and lows and trends. Think about how you would present numerical data from your research. Use bullet points under tables, charts and graphs to highlight the main points. Quotes from interviews and focus groups will serve to bring to life the spirit of the project. Again, think about how you might use images to illustrate your research findings.

Below is a tried and tested way to structure your final evaluation report.

This will be in table form when it is complete

Summary

Most people will only read the summary of your evaluation. Therefore it should pull out the key points, including a mention of each of the impacts. The order that you present the information should mirror the structure of the full report so that anyone who wants more information about a particular aspect of the project can easily find it. The summary should be clear, concise and to the point. It is always best to write this section last because you will need to know exactly what is in the full report in order to complete the summary.

Introduction

This should set out:

- the background to your project
- why you wanted to do the project
- what you hoped to achieve and why
- the aims and objectives of the project
- the aims and objectives of the evaluation
- the structure of the remainder of the report.

Evaluate! The report

Here you should write a brief description of the project. You need an outline explaining what it is you are trying to achieve, how the project came about and how you knew the project needed to be done.

You need to list the aims and objectives and briefly explain what is going to be in the rest of the report.

The project
In this section you need to explain what you did, the inputs to the project, and whether the project met its objectives. You need to clearly address each objective in turn and explain what the outcomes or impacts were, why they occurred and whether the objective was met.

Describe any unexpected outcomes that occurred, why you think they occurred and whether they are good or bad.

You also need to talk about any lessons learnt. For example what would you do differently next time and why. You should include key learning points for others or for future work you might undertake. Also include a discussion about the unexpected outcomes/impacts and how to ensure they either occur again or not, depending whether they were good or bad.

Conclusions
This should be a summing up of the key achievements of your project, outlining what went well and what could have been done better. You should briefly describe the impacts of the work whether the project met its overall/key aim(s). There should be no new information in the conclusion.

Annexes – these are extra documents that you can include with your final evaluation report.

- full details of your methodology
- how you selected your sample
- copies of questionnaires and topic guides
- some information about how you analyzed your data
- relevant databases or spreadsheets

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Reporting
Summary
Introduction
The project
Conclusions
Annexes

Understanding
Formative evaluation
Evaluation of processes
Summative evaluation

Monetising
Financial impacts
Financial outcomes
Proxies

The Cycle
of
Evaluation

Planning
Identifying aims
Setting objectives
SMART
Outcomes

Identifying
Non financial impacts
Baseline
Objectives set
Impact

Gathering
Baselines
Quantitative
data
Qualitative data

Processing
Quantitative data
Qualitative data
Coding

Gathering
Questionnaires
Interviews
Observation
Visitors book
Media impact

Evaluate!

Evaluate!

Appendix 1
Financial measures for some illustrative outcomes linked to the Sustainable Community Strategy areas for action for Herefordshire

Introduction

This appendix provides examples of how to monetise project outcomes. It explains the monetisation of one outcome for each project, but also gives examples of other outcomes that may arise from such a project, for different stakeholders.

Most of these examples show how to monetise either using direct cost saved, or the direct benefit of the outcome. Some show how financial *proxies* might be used in cases where direct costs or benefits are not available. These are clearly identified.

The appendix is structured around the main areas for action identified in Herefordshire Partnership's Sustainable Community Strategy 2010/2011 and some ways to deliver these objectives:

> **Work, wealth and business**
> *We want to improve business and employment opportunities in Herefordshire so everyone can enjoy long term success*
> Increase the economic potential of the county, with particular regard to higher skilled and better paid jobs
>
> Increase access to learning and development at all levels, and increase participation, in order to raise achievement, address worklessness and improve workforce skills
>
> Improve access to integrated public and community transport, reduce traffic congestion and encourage alternatives to car use
>
> **Children and Young People**
> *We want to improve the lives of children and their families. We want all children and young people to have the learning and skills they will need to lead full and happy lives*
> Improve participation in, and achievement for, young people in education, employment and training post 14

Encourage and enable children and young people in Herefordshire to achieve their potential and participate in positive activities

Stronger Communities
We will develop stronger communities where everyone is included, people enjoy a good quality of life and feel that they have a say in the decisions which affect them
Increase the availability of appropriate, decent and affordable housing

Improve the availability of sustainable services and facilities and access to them

Encourage thriving communities where people are able to influence change and take action to improve their area, regardless of their background

Healthier communities and older people
We want to work with people and communities in Herefordshire to support them to live healthy and full lives
Encourage and promote a healthy lifestyle, with particular attention to reducing smoking, levels of obesity and excessive consumption of alcohol

Help vulnerable people to live safely and independently in their own homes

Safer Communities
We will work together to make Herefordshire an even safe place to live, work or visit
Further reduce the already low levels of crime, disorder and anti-social behaviour in the county and to reduce disproportionate fear of such

Increase safety for road users in the county

Environment
We want to protect Herefordshire's environment and take action on climate change
Minimise domestic and commercial waste, and increase recycling

Lead a local contribution to climate change reduction

Strengthen resilience to and recovery from civil emergencies, which may have a long term impact on Herefordshire communities, through effective partnership planning and co-ordination

The financial values used in this appendix are based upon data publicly available on the internet at April 2012. These values will change over time. Web addresses have been given to sources used which may provide more up-to-date information.

Any cost savings that you use need to be those that could really happen as a result of the project. Some average unit costs will include fixed costs like the cost of buildings. Where possible, fixed costs should generally be excluded from a cost used to monetise a project outcome because they are unlikely to be saved as a result of your project.

Remember that monetisation is not an exact science. The values that you use will depend upon your project, the context and your stakeholders. This appendix gives a range of examples but you will need to make your own case based upon your understanding of your own project.

Examples of monetisation of outcomes

Related possible project	Possible project outcome	Possible stakeholder and indicator	Possible financial measure	Sources
Increase the economic potential of the county, with particular regard to higher skilled and better paid jobs				
Training programme	Train an unskilled person to Level 2 City and Guilds	A **trainee** achieves their Level 2 **certificate**	Increased pay £40 per week	http://cee.lse.ac.uk/cee%20dps/ceedp46.pdf http://www.direct.gov.uk/en/Employment/Employees/TheNationalMinimumWage/DG_10027201
According to research in 2004, men with City and Guild craft qualifications and no other qualifications receive wages 19% higher than those with no qualifications. Assuming that the unqualified worker is paid the national minimum wage of £6.08 per hour for a 35 hour week, they will be paid £213 per week. Based upon this research, the worker with the Level 2 qualification will be paid 19% more than this at £253 per week [£213 × 1.19]. The difference £40 per week [£253 - £213] could be assumed to be a benefit of the training to the trainee.				
Other possible outcomes from this project might be that the company avoids having to recruit a new worker and workforce productivity increases; the worker's self-esteem benefits; the training company earns a training fee.				
Increase access to learning and development at all levels, and increase participation, in order to raise achievement, address worklessness and improve workforce skills				
Skills mentoring project	Assist an unemployed person to get a job	The **government** reduces **benefits** paid	Jobseekers allowance £71.00 per week	http://www.direct.gov.uk/en/MoneyTaxAndBenefits/BenefitsTaxCreditsAndOtherSupport/Employedorlookingforwork/DG_10018757
Government does not have to pay the person job seekers allowance of £71.00 per week when he gets a job				
Other possible outcomes from this project might be that the worker's self esteem benefits; their family's living conditions improve; government receives tax on the employment.				

Improve access to integrated public and community transport, reduce traffic congestion and encourage alternatives to car use				
Local lift sharing project	Share a lift	A **commuter** saves **fuel** costs	Cost of fuel 13.3 pence per mile	http://www.ford.co.uk/Cars/Fiesta/Performanceandefficiency

The commuter saves the cost of the petrol used for each mile he doesn't have to use his own car because he is sharing a lift. For a Ford Fiesta 1.6i, fuel efficiency is 47.9mpg [miles per gallon]. This converts to 10.5 miles per litre [47.9÷4.546 conversion factor] If petrol costs £1.40 per litre, then the cost per mile is 13.3 pence [£1.40÷10.5 mpl]

Other possible outcomes from this project might be the environment which benefits from carbon savings (of 134g/km for this car); the people with whom the car is shared save cost, the people car sharing benefit from better community support; all commuters save time getting to work; local businesses benefit from less congestion.

Improve participation in, and achievement for, young people in education, employment and training post 14				
Music workshop	Get a young person not in education, employment or training, to attend a music workshop	A **young person** spends **time in the music workshop**	Based upon the cost of a counselling session locally £17.50 per hour	http://www.mindfulnesscounselling.co.uk/info2.cfm?info_id=63614

This is an example of the use of a financial proxy: Where a young person has low self esteem, the music workshop might be a chance to have fun and to reduce stress. As there really isn't a direct measure of stress, it is necessary to think laterally to find a value for this. What other ways might people go about reducing stress? One way would be to visit a personal counsellor. The cost of counselling therapy with one local therapist is £35 per hour. It may be that the music workshop achieves in two hours the same as one hour of one-to-one therapy, therefore the financial proxy could be £17.50 per hour.

Other possible outcomes from this project might be that the young person learns music skills that they can use to generate income or for enjoyment; people at the workshop develop a group cohesion; government agencies do not have to deal with antisocial behavior

Encourage and enable children and young people in Herefordshire to achieve their potential and participate in positive activities				
Young person volunteering scheme	Help a young person to volunteer with a charity	A **charity** gets administration support for free through **volunteer time**	Average hourly earnings £9.54	https://www.nomisweb.co.uk/reports/lmp/la/2038431939/report.aspx
The charity needs to get its administration done and without the help of the volunteer would have to pay for it. The average hourly wage in Herefordshire is £9.54. (The VITAL Herefordshire Leader programme uses £7.75 per hour as the in-kind equivalent for administrative volunteering. This would be another possible measure).				
Other possible outcomes from this project might be that the young person learns skills that enhance their CV so that they get a job; increased self esteem for the young person; the charity attracts funding because it is able to develop its place in the community				
Increase the availability of appropriate, decent and affordable housing				
Renovate a redundant building	House a homeless person	The **local authority** avoids the cost of **housing**	Cost of bed and breakfast £25 per night	http://www.bedandbreakfasts.co.uk/propertysearch.asp?townCity=Hereford
The local authority avoids the cost of supporting the homeless person. This support could come in a number of ways; the cost of providing a bed and breakfast room is £25 per night.				
Other possible outcomes from this project for the local public services might be the avoidance of crime and health problems; increased self esteem and personal safety for the homeless person; less stress for relatives and friends				
Improve the availability of sustainable services and facilities and access to them				
Buddying project	Buddy brings an isolated person to a drama club.	An **isolated person** spends **time in the drama club** activity	Cost of spa day £20 per hour	http://www.holmerpark.co.uk/2011/PDF/SpaDays.pdf
This is an example of the use of a financial proxy: Encouraging someone to join a club may make them feel more connected to their community, with the sense of support and wellbeing that this might bring. As there really isn't a direct measure of this wellbeing, it is necessary to think laterally to find a value for this. What other ways might people go about improving wellbeing? One way could be a spa day, the cost of which locally is £139 per day, or £20 per hour [£139/7 hours]				
Other possible outcomes from this project might be that the primary care trust reduces the use of mental health services; the buddy's sense of wellbeing				

Encourage thriving communities where people are able to influence change and take action to improve their area, regardless of their background				
Community group	Encourage a person to be involved in a community group	The **local authority** reduces the cost of **consultation**	Average hourly earnings £9.54	https://www.nomisweb.co.uk/reports/lmp/la/2038431939/report.aspx
The cost of the time volunteered by the community which would otherwise have to have been paid for. For example this might be the cost of delivering a Parish Plan questionnaire to households in a rural area. The average hourly wage in Herefordshire is £9.54. (The VITAL Herefordshire Leader programme uses £5.80 per hour as the in-kind equivalent for unskilled labour volunteered. This would be another possible measure).				
Other possible outcomes from this project might be the benefit to a person of being involved in the local community; ensuring that local authority provides services appropriate to place, therefore avoiding the waste of unwanted services; the benefit of local community cohesion				
Encourage and promote a healthy lifestyle, with particular attention to reducing smoking, levels of obesity and excessive consumption of alcohol				
Stop smoking class	Help a person to reduce smoking	**Smoker** smokes fewer **cigarettes**	Cost of one cigarette 37 pence	
A smoker saves £7.46 for every packet of cigarettes not smoked.				
Other possible outcomes from this project might be that the smoker has a longer life; the primary care trust avoids the cost of dealing with the health damage caused by smoking; friends enjoy cleaner air; the smoker's family has more disposable income; the employer benefits from less absenteeism				
Help vulnerable people to live safely and independently in their own homes				
Meals on wheels	Provide daily support to an old person in own home	An **old person** can continue to **live in their own home**	Cost of room in old age peoples home £700 per week	http://www.carehome.co.uk/carehome.cfm/
An old person is able to continue to live in their own home. Without this support they may need to move to a nursing home. The cost of a single room in a local care home for the elderly is £700 per week.				
Other possible outcomes from this project might be that the family of the old person worry less about them; the local authority may be able to reduce its support for the old person				

Further reduce the already low levels of crime, disorder and anti-social behaviour in the county and to reduce disproportionate fear of such				
Land-based therapy for drug users	Past drug user engaged to prevent re-occurrence of drug use	**Primary care** problem drug use **treatment**	Cost of A& E admission for a drug overdose £197 per annum	Home Office Research Study 249 The economic and social costs of Class A drug use in England and Wales, 2000 Christine Godfrey Gail Eaton Cynthia McDougall and Anthony Culyer http://www.emcdda.europa.eu/?fuseaction=public.AttachmentDownload&nNodeID=1986

There are many health risks associated with problem drug use and the primary care trust has to bear the cost of treatment. The Home Office estimates that the average annual cost for a problem drug user not in treatment is £933 per annum. Within this estimate, the cost of an admission to A&E due to accidental overdose is £282 and there is an estimated 70% risk of admission. Therefore the possible cost saved in A&E by engaging a drug user in meaningful land-based therapy is £197 per annum.

Other possible outcomes from this project might be reduction of worry for the family of the user and reduced risk of transmission of infection; user learning skills for employment; reduced fear of crime in the wider community; reduced crime and need for criminal justice interventions; reduced need for other health care; farmer income

Increase safety for road users in the county				
Driving course	Provide driving skills to reduce accidents	The **government** deals with fewer **road accidents**	Public cost of road accident involving slight injury £1,310	Department of Transport http://www.dft.gov.uk/webtag/documents/expert/unit3.4.php#2_3

The cost of road accidents borne by government would be reduced. The cost estimate for police and medical intervention at a road accident involving slight injury is £1,310 according to the Department of Transport (£21,372 taking into account all factors such as human costs and lost output).

Other possible outcomes from this project might be the benefit to the road user of avoiding accidents and more efficient motoring; the safety of family and friends; and the insurer's cost of damage to property.

Minimise domestic and commercial waste, and increase recycling				
Recycling checks and training	Correct recycling and reduce landfill	A **business** sends less **waste to landfill**	Landfill tax £56 per tonne	http://www.businesslink.gov.uk/bdotg/action/detail?type=RESOURCES&itemId=1074404201

Landfill tax of £56 per tonne is paid by businesses disposing of waste using a landfill site. It can therefore be avoided if waste is recycled.

Other possible outcomes from this project might be the environment benefits from less soil leaching or methane emissions; the business may identify a new income stream using recycled material; the local authority reduces cost of landfill from households; local community may benefit from less road transport and lower Council Tax,

Lead a local contribution to climate change reduction				
Community home insulation initiative	Insulate a house	The **environment** benefits from lower **energy use**	Reduced carbon dioxide emissions £29 per annum	http://www.energysavingtrust.org.uk/Home-improvements-and-products/Home-insulation-glazing/Loft-insulation

The Energy Saving Trust estimates that installing 270mm of loft insulation will save energy use which would have carbon dioxide emissions of 720kg per annum. The Stern Report placed the external cost of one tonne of carbon dioxide at £40, therefore the benefit of saving 720kg of carbon dioxide is £29 [£40 × 720kg/1000]. The estimate is that 0.543kg of carbon dioxide is emitted for each kWh of electricity used.

Other possible outcomes from this project might be that the householder saves on fuel bills (estimated by the Energy Saving Trust in this scenario to be up to £175 per annum); family live in more comfortable living conditions

Strengthen resilience to and recovery from civil emergencies, which may have a long term impact on Herefordshire communities, through effective partnership planning and co-ordination				
Neighbourhood support project	Develop local support network	**Householder** has improved **perception of local area**	Amount spent on home improvements in West Midlands £410 per household per annum	http://www.mediacentre.lloydstsb.com/media/pdf_irmc/mc/press_releases/2009/April/4109pressrelease.pdf

This is an example of the use of a financial proxy: As a result of being part of a local support network, a householder may feel a stronger sense of community and belonging. As there really isn't a direct measure of such social cohesion, it is necessary to think laterally to find a value for this. How might social cohesion manifest itself? One way might be that a householder who feels settled in their community may spend money on improving their home. The average spent on home improvement according to the Family Spending Survey in 2008 was £410.

Other possible outcomes from this project might be the local authority has a network in place to communicate with communities; local businesses benefit from local purchasing

Evaluate!

Appendix 2

Monetising your project, part 3:
The time value of money

Some projects will create changes and produce outcomes that continue for a number of years after the project ends. This makes the calculations slightly more complex. If you are really confident that the outcome will continue into the future and this is important for your project evaluation you should complete part three of the monetisation process.

You will need to estimate the number of years over which the outcomes continue ("outcome duration"). You might be able to find this out by asking people or it could be based upon long term research elsewhere. It is important that you explain the basis on which you have decided the outcome duration and that you don't over-claim.

Where outcomes last more than one year there is likely to be a drop-off after the first year, as the initial effect of the project gets diluted. This might be estimated as a percentage based upon finding out the longer term effects of similar projects in the past.

It is common sense that people prefer to have money now rather than later, and the further in the future benefits are expected to arise, the less valuable they are to people now. This is known as **the time value of money**.

An economic concept called **Present Value** adds together future cash flows, which have been discounted to take into account this preference for money now. Present Value is an economic term used to show what money received in the future is worth today.

For example:
How much is a £110 lottery win in 1 year's time worth today?

To find out, money in the future must be discounted using an appropriate interest rate to obtain its Present Value.

If the interest rate is 10%, £100 now would be £110 in a year. So that shows that the "present value" today of £110 in one year's time is the same as £100 now.

Using this concept allows the project to be viewed at what the financial value of the outcomes is today even though changes due to the project may continue into the future.

The monetised outcomes from the project should be discounted using the rate suggested by Government studies which is based on an annual discount rate of 3.5% as shown in the discount table below.
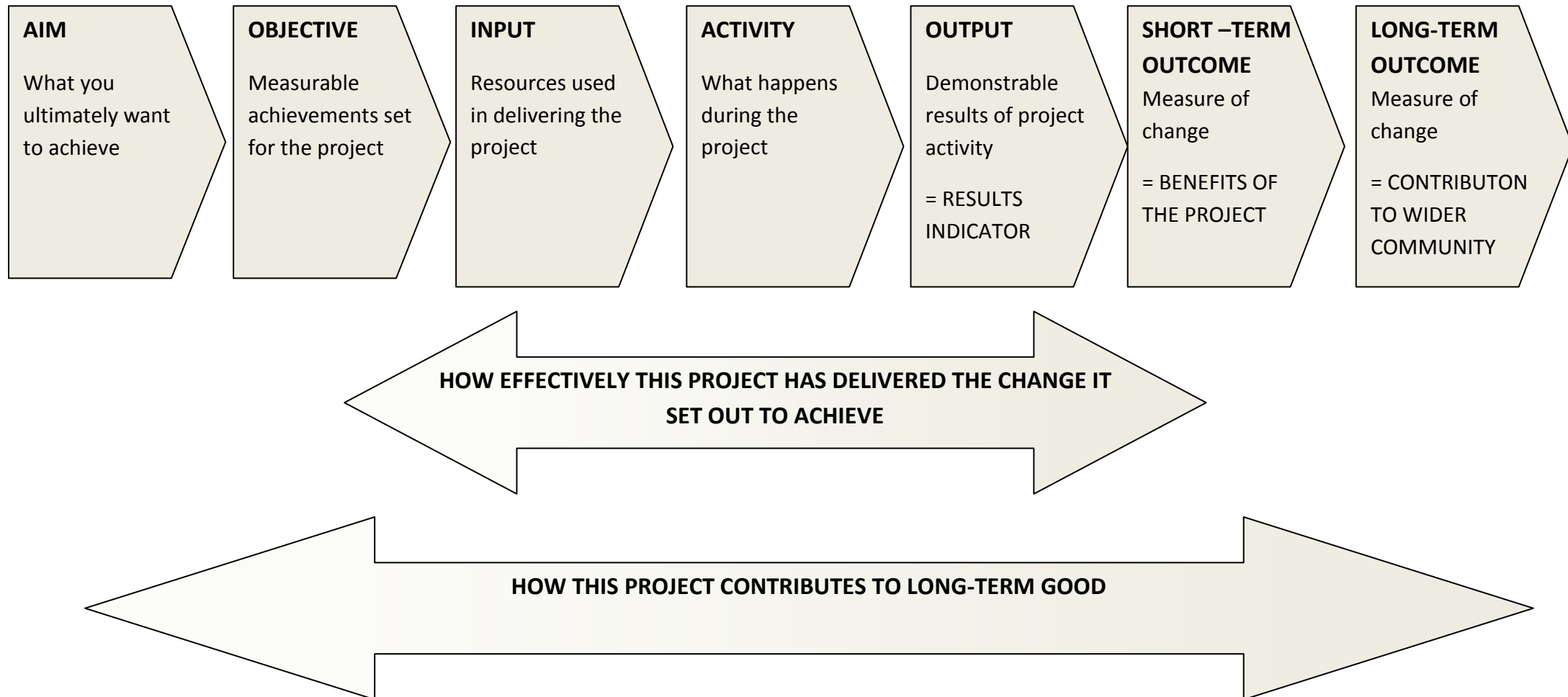
Discount factors at 3.5%

Where project outcomes span a number of years, the monetised outcomes in each of the future years should be divided by the following discount factors:

Year 1	1.035
Year 2	1.071
Year 3	1.109
Year 4	1.148
Year 5	1.188
Year 6	1.229
Year 7	1.272
Year 8	1.317
Year 9	1.363
Year 10	1.411

Evaluate!

Appendix 3

Key terminology of evaluation

AIM	**OBJECTIVE**	**INPUT**	**ACTIVITY**	**OUTPUT**	**SHORT –TERM OUTCOME**	**LONG-TERM OUTCOME**
What you ultimately want to achieve	Measurable achievements set for the project	Resources used in delivering the project	What happens during the project	Demonstrable results of project activity = RESULTS INDICATOR	Measure of change = BENEFITS OF THE PROJECT	Measure of change = CONTRIBUTON TO WIDER COMMUNITY

HOW EFFECTIVELY THIS PROJECT HAS DELIVERED THE CHANGE IT SET OUT TO ACHIEVE

HOW THIS PROJECT CONTRIBUTES TO LONG-TERM GOOD

Evaluate! Where to go for further support

If you would like further support in preparing or carrying out an evaluation, here are some of the places that might be able to help:

For help using Evaluate! :

Kyre Oak

christianne@kyreoak.co.uk
01547 560021

The Bulmer Foundation

info@bulmerfoundation.org.uk
01432 378409

For general advice on evaluation:

SROI UK www.sroi-uk.org

Charities Evaluation Service
www.ces-vol.org.uk

National Council for Voluntary Organisations
www.ncvo-vol.org.uk/strategy-impact/impact

New Economics Foundation
www.neweconomics.org/programmes/valuing-what-matters

For data needs:

Your Local Authority research team may be able to assist with data needs.

We gratefully acknowledge the help of many people and organisations in developing this Guide. The Guide has been created based upon best practice published by other organisations. Whilst some of the terminology used by other organisations may be slightly different, everyone is aiming towards the same target of being able to demonstrate delivery against objectives. We hope that you find it useful.

Herefordshire
Community Safety Partnership

PAVO
Powys Association of Voluntary Organisations
Cymdeithas Mudiadau Gwirfoddol Powys

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Planning for tomorrow, acting today

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Evaluate!   A toolkit for evaluating your project