Evaluate! 1: Getting started

1

Before you begin your evaluation, please read the accompanying Evaluate! guide. This will give you the necessary understanding of the background and process to be able to effectively evaluate your project.

Ideally you should begin the evaluation in the planning stages of your project but if you are starting during the project or after it has finish, read both the guide and the cards thoroughly and you should be able to engage with the process at the relevant stage.

Once you have read through the guide, use the instruction cards to take you through the process step by step. You can refer back to the guide whenever you need more information.

The cards are colour coded and match with the related section of the guide to help you find the information you need more easily.

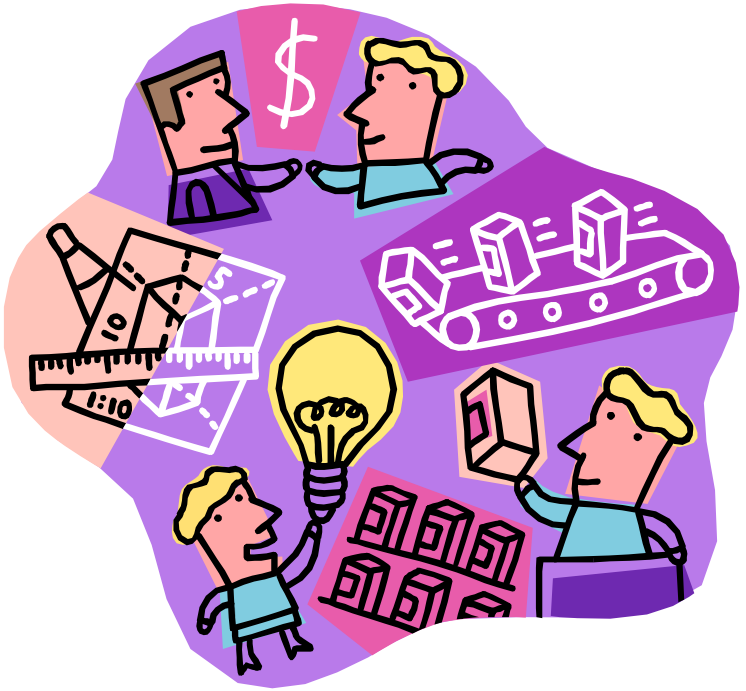
If you get stuck, there are some contacts listed in the back of the guide who might be able to help.

This is the first step in the evaluation process and should be carried out in the design phase of the project. Thinking about evaluation at this stage helps shape the project to ensure that it will deliver what you need it to and to be able to accurately measure the project outcomes at the end.

This stage is often carried out by project staff, rather than the evaluator.

1. Think about and identify the target audience / participants / group / stakeholders for the project.
2. Identify the aims and objectives of the project. (The project performance will be evaluated against these.)
3. If appropriate, test ideas and/or run pilot activities (e.g. via focus groups) on a sample of the target group to find out what will work best.
4. The information obtained from these activities should be recorded. This could be through notes or questionnaires etc.

Note: This type of evaluation planning process can also be used periodically throughout the project to make sure its work stays in line with the aims and objectives and maximises its benefits. This is called formative evaluation.



Evaluate! 2: Planning your evaluation

2

First consider the following:

What do you want to change?

Why does the change need to happen?

Now state your aim(s) here:

Does your aim reflect the change you want to make?

* * *

Now state your objectives here:

Are your objectives smart?

S: Does your objective clearly state what is to be done?

M: Can you measure the output(s) of the objective?

A: Can you realistically achieve the objective?

R: Is the objective relevant to the aim(s) of your project?

T: When will the objective be achieved by?

This is where the external evaluator is likely to start work

1. Discuss with the project team what trials, pilots or surveys have already been used.
2. Collect together the results of this work.
3. Look for qualitative and quantitative data.

Baseline Data

1. One of the first things you need to do is to obtain baseline data. This will give you a measure of how things stand before the project work begins.
2. The best way to collect the baseline data is through a questionnaire before the project starts. An alternative way to approximate baseline data would be to look at a comparable group who did not participate in the project.

Note: The *baseline data* will be used at the end to measure what changes have occurred as a result of the project.

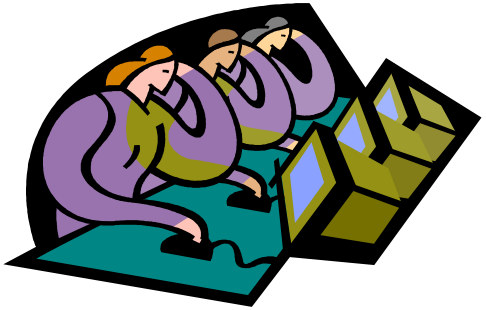
Example

Western Training is running a course to improve numeracy.

At the course start all learners fill in a baseline questionnaire which asks questions such as:

1. What level is your highest qualification?
   a) Below level 2 b) level 2 c) level 3 or above
   This is quantitative information.
2. Describe what you hope to achieve as a result of doing this course.
   .....
   This is qualitative information.

The answers to these questions form part of the *baseline data* the organisation will use to show how well the course has worked at the end of the project.



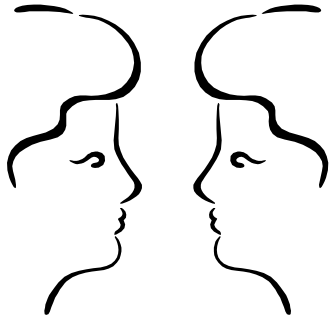
Questionnaires

In partnership with the project team you need to design questionnaires in order to collate the views of participants in the project. The same basic principles are used for both qualitative and quantitative data collection.

1. Design the questionnaires to be used in conjunction with the events you run during the project.
2. When composing the questions, think carefully about what information you need to collect in order to measure the impact of the project.
3. Frame the questions so that they are relevant to the aims and objectives of the project.
4. Only ask for information you will use.
5. Remember to ask the same questions in the baseline questionnaire and after the project in order to measure the changes that have occurred.
6. Word the questions so that a precise response is given.
7. Make your questions short and to the point.
8. Ask only one question at a time (i.e. make sure you don't ask two things in the same question).
9. Set the literacy level so that the audience understands the content.
10. Start the questions with how much, how many, how often, to gain your quantitative (numerical) information.
11. Use open questions for the qualitative data e.g. begin the questions with why, when, how, which, what etc to record the nature and the substance of the project.
12. Code the possible responses to your questions so that you can easily analyse the responses given. (See the Data Processing cards for more information on this).
13. Restrict the questionnaire to one or two pages as this will improve the response rate.
14. Put the questions relating to more personal information you want to collect at the end of the questionnaire (e.g. age, sex, education and ethnicity).
15. Distribute questionnaires at the beginning of an event to enable participants to think about the qualitative answers they need to include.

Telephone interviews

1. Use a structured pro forma/questionnaire as this will help record the responses.
2. Your questionnaire should be short as for the best results telephone interviews should last no longer than 10-15 minutes.
3. Use open questions starting with "who, what, when, where, why" this will allow for a fuller response from your participant.
4. You should ask only for information you will use in demonstrating the results of your project.
5. Make sure you speak to the right person.
6. If English is not the interviewee's first spoken language you could offer someone with the right language skills to carry out the call.
7. Repeat any questions that are not fully understood.



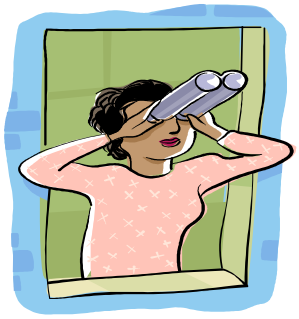
Face to Face Interviews

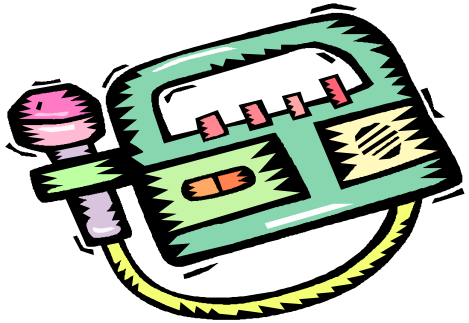
1. Use a questionnaire to structure your responses.
2. Use phrases like "tell me more" or "tell me about" encourages the respondent to talk more and expand on their answers
3. Use open questions starting with "who, what, when, where, why" this will allow for a fuller response from your participant.
4. You could show prompts, like cards or pictures during the interview as this is a reliable way to get a better response from your participant.
5. If appropriate organise the language skills necessary to carry out the interview.
6. For best results set a limit of 30 - 45 minutes for a face to face interview.

Observational Research

This is a way to evaluate the progress of your project by watching, noting and assessing what happens.

1. Make a list or topic guide of the things you are interested in finding out from the participants.
2. You can then record them against the structure you have created.
3. Record how and which people influence discussions.
4. Observe and take note of how people behave and engage with the project.
5. Compare how people interact with each other.
6. Use audio or visual recording to capture the depth and direction of the conversation to give a better insight and reflection.



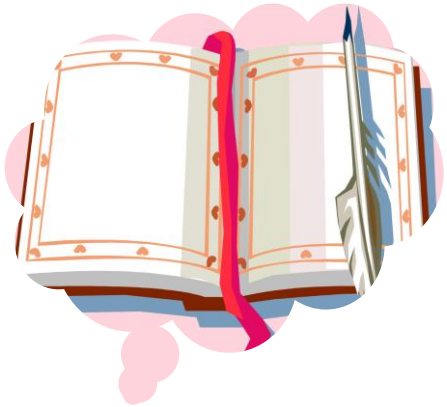


Observational Research continued

7. Look at and make a note of the types of people who participate at your event.
8. Where appropriate, count the number of people at a venue/event.
9. Watch to see how people access websites and CD ROMS etc.
10. Make notes of the main areas of concern/interest raised.
11. Collate the issues that need following up at future interviews.

Tip: Build relationships with participants at this stage of the project to benefit any possible further interviews.

Visitors Book

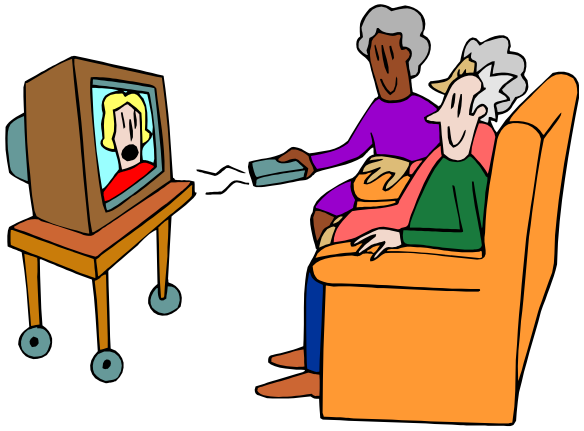


A visitors' book at your event may be a good idea as this is another avenue for recording participants' views on your project.

1. Place the visitors book in a prominent position near the exit at the event.
2. Choose a book that has a section for comments clearly set out.
3. Ask participants to also record names and contact details if appropriate.
4. Collate comments made and add to your evaluation data.
5. Make a note of comments that may be useful for future projects.

Media impact

- It can be useful to look at the readership figures or sales of the publication you have used to gauge the numbers you have reached.
- Use viewing and listening figures when it is television or radio media that you have used.
- Note that readership/viewing figures are a guide only, not a guarantee that the project's contribution has been noticed or considered.



Analysing Quantitative Data

This card shows a way of quantifying data received and the process of recording information that has been collected from the questionnaires used.

1. First, set a rule that if a participant has provided two answers where only one was needed you have a set process to deal with this. e.g. Decide to take the first answer as the one you will record.
2. Study all the question formats you have used to gather information.
3. Read through all the responses to each question.
4. Collate and record the responses to each question to give the total number of each response (e.g. How many people did something once per week, twice per week etc.)

Tip: You can use a spreadsheet to help analyse the data. Especially if there are large numbers of questionnaires to deal with (see example on the next card).

Tips:

- Record the environmental changes that have taken place as a result of the project.
- Check how the project has performed against local priorities as set out in the Sustainable Community Strategy or equivalent document.
- Take note of the initial response of long term impacts that cannot be measured immediately.

Creating a Spreadsheet to analyse questionnaire responses

1. Create a spreadsheet and put the title at the top.
2. Put the question number in the first column.
3. Number the respondents across the top of the first row.
4. In the next column list each answer option for that question
5. For each respondent, place a number 1 against the response they have chosen for that particular question.
6. When you have entered all the answers for all respondents, total the rows across to get the number of responses for each option.
7. Repeat for question 2 etc.

Tip: Keep a master copy of the table; it may be used for further detail. e.g. gender or age analysis.

Example

For question 1, a 1 is entered in the box for the answer each respondent has chosen. Other cells are left empty.

Respondent No 1 answered twice a week
Respondent No 2 answered once a week
Respondent No 3 answered once a month

When all responses are logged, the total of the rows across the spreadsheet give the total for the analysis of the questions posed.

Q1

Respondent No.	1	2	3	4	5	6	7	8	9	10	Totals
Once a week		1		1		1		1		1	5
Twice a week	1										1
Once a month			1				1				2
Not at all					1				1		2

Analysing Qualitative Data

1. Select and look at the main issues discussed at events or focus groups.
2. Listen to recordings made at interviews and make a note of participants' views.
3. Record relevant quotes from participants.
4. Look back at DVDs and record any key observations as body language and gestures will give more insight into to what has been expressed.

Tips:

- Avoid bias in highlighting all comments received.
- Ensure that any changes you record are clearly identified by the participant.

Changes identified from qualitative data gathered

1. Explore if and why participants views have changed from notes made at all interviews.
2. Interpret any comments as they were presented by the participant.
3. Compare the changes in body language and gestures when examining DVDs recorded at events, by observing attitudes before and after the event.
4. Measure changes in opinions quoted from participants.
5. Make a record of ideas from participants that will help with the development of the project or future projects.

Evaluate! 5: Identifying the project impacts

1

To identify project impacts you need to look at the changes that have occurred as a result of the work that has been undertaken. In order to do this you will need to consider the outputs from your project (demonstrable results such as numbers of people involved in the project) and outcomes, which are measures of change. These may be short term or long term. The impact is the difference made by creating changes.

Refer to the Glossary and Section 2 of the Guide that describes this in more detail.

Appendix 3 of the Guide provides a diagrammatic representation of how to consider the changes in the context of your project.

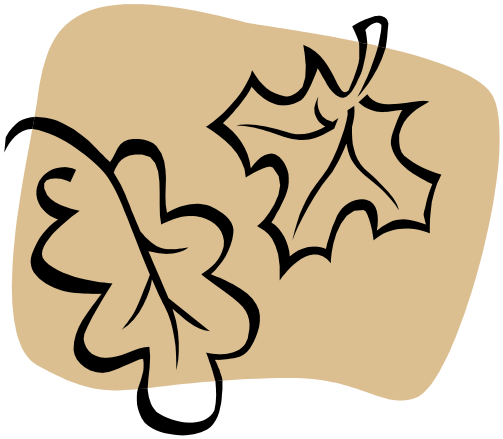
Non financial outcomes

1. Look at the baseline data already collected.
2. Re-visit the objectives set at the beginning of the project.
3. Describe the changes observed.
4. Non financial outcomes can provide richness to your evaluation to complement the quantitative data.

Project outcomes identified from the quantitative data gathered

1. Draw conclusions from the information in the spreadsheet completed earlier in the processing data section.
2. Compare the baseline data with the data collected by the end of the project.
3. Measure and record the evidence of all changes that have occurred.
    - Information for environmental impacts that have occurred (see tips).
    - Make note of changes in the quality of life of project beneficiaries, which shows the wellbeing impacts of the project.
    - Make sure you record impacts related to local priorities, if appropriate.

Appendix 1 of the Guide describes a range of possible outcomes for a project.



Tips:

Examples of environmental outcomes.

- Increase in re-use
- Car sharing = reduced mileage = reduced emissions
- Recycling by using recycled paper within the project or refillable inks

Examples of well being outcomes

- Increase in happiness
- Training completed leading to employment
- Reduce smoking = better health

Tips:

- Check the local priorities relevant to your project set out in the Sustainable Community Strategy or equivalent document.
- Quotes from the qualitative data can be used in the final report.

6: Monetisation

This section will show how to put a financial value on the impact achieved by the project (monetisation).

The process is divided into three parts

Part 1
This is where you select the outcomes previously identified and apply a financial value to each change.

Part 2
This is where you filter out the changes that have occurred that are due to other factors, not as a result of the project.

Part 3
This is where outcomes that last for several years after the project has ended (longitudinal outcomes) will be monetised and should be used if you are confident that this is the case.

Tips:

If the objective of the project was to improve the health of a particular group, one of the outcomes could be that these people make fewer GP visits; therefore the savings made are a financial outcome of the project. (Costs of a GP visit are available from the NHS)

When choosing a cost saving as a financial value, make sure that you only include costs that can be saved and therefore exclude any overhead costs eg eliminate costs such as running the surgery from the cost of a GP visit. Sometimes, you will need to estimate these overhead costs.

Concentrate on those changes that really matter as trying to monetise every small change is a waste of time.

Monetising the project - Part 1

1. Examine the baseline data collected and look again at the objectives set for the project. Note the outcomes (the changes that have occurred to the project stakeholders).

2. Study the previously identified outcomes, select those that will have a monetary value and find a way to attach a financial value to each change that has occurred as a result of the project. (see tip opposite).

Tip

Concentrate on changes that really matter, monetising every small change will waste time.
A list of popular outcomes with financial measures is in Appendix 1 of the Guide.

Part 1

To identify a way of giving a financial value to each change that has happened:

1. Establish first if the financial measure is a direct cost. (A direct cost is a directly quantifiable amount such as a cost of a service no longer accessed as a result of the project).
2. Source information giving financial values from government agencies. e.g. NHS for GP visits. Use websites for financial information not available from government agencies.
3. Use an approximation of cost (**proxy**) for your financial measure where there is not a direct cost. You'll need to estimate the value (see Section 6 of the Guide for more explanation and Appendix 1 for a list of popular outcomes and associated example proxies).
4. Record the assumptions made for your estimates to show how you arrived at a proxy value.

Giving the outcomes financial values in this way illustrates the gross financial impacts that have occurred in the duration of the project.

Some sources that could help define financial values

Health care unit costs – www.pssru.ac.uk/project-pages/unit-costs/2011/index.php

Carbon footprint calculation - www.carbontrust.com/media/44869/j7912_ctv043_carbon_footprinting_aw_interactive.pdf

The SROI Network holds a peer maintained database of outcomes and values – www.wikivois.org

Search internet for relevant academic research

Local authority research team

Part 2

This is where you work out the net value of the project outcomes. i.e. the financial value of the changes that occurred in the duration of the project, which were solely attributable to the project.

1. Estimate the value of the project outcomes that would have happened anyway, without the project (this is called **deadweight**).
2. Estimate the value of the changes were due to something else like another project or initiative (this is called **attribution**).
3. Estimate the value of the changes that have occurred because a problem has moved elsewhere as a result of the project. (this is called **displacement**).

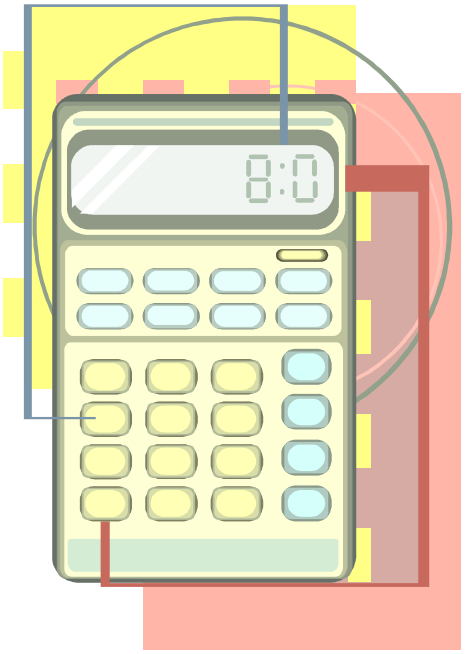
Examples:

1. **Deadweight:** Reduction in number of alcohol misusers through death or simply managing to abstain from misuse through their own efforts or maturity.
2. **Attribution:** People benefitting from another local programme, e.g. AA or national advertising campaign.
3. **Displacement:** Movement of problem drinkers to another area to avoid confronting issues or because of local enforcement.

Tip: Deadweight, attribution and displacement are a percentage of the outcomes previously calculated.
They may not all be relevant to a project, but you need to at least consider each.
They can only be estimates, so use common sense and don't spend too much time on arriving at the estimate.

Part 2 continued

4. Take the financial values arrived at in part 1 and minus the values of deadweight, attribution and displacement from Stage 2. This gives the true financial impact of the project. (See example opposite.)



Example - using an alcohol misuse reduction project.

Monetized outcomes of the project:

Part 1 - Monetised value of outcomes

Financial value of each outcome added together **£62,000**

Part 2 – Net value of outcomes

Deadweight 2% of misusers died or abstained by own efforts
2% * £62,000 = £ 1,240

Attribution 10% misusers benefitted from other programmes
10% * (£62,000-£1,240) = £ 6,076

Displacement 7% alcohol misusers moved elsewhere to avoid the project
7% * (£62,000 - £1,240 - £6,076) = £ 3,828

Part 2 total £11,144

Now subtract the part 2 total from the part 1 total:

	Part 1	£62,000
minus	Part 2	£11,144

True financial impact of the project £50,856

Part 2 continued

5. Now establish the full cost of the project by totalling:

   a. The monies received from funders
   b. Money put into the project from the organisation running the project (if applicable)
   c. The approximate value of the volunteer time, goods and services donated as an in-kind contribution.

6. Compare the total monetary value of the outcomes to the financial input to show the full financial picture of the project (i.e. The added value the project has created).

Examples

5. Full cost of the project:

Received from funders	£42,000
Nil received from organization	
Volunteer time (10 hours at £10 per hour)	£100
Goods received in kind e.g. printing and paper	£600
Services received in kind e.g. meeting room hire	£20
The total value of the project	£42,720

Tip: Local voluntary sector support organisations can supply hourly rate equivalents for volunteers. Comparisons of local rates can be made for goods and services that have been donated "in kind" to the project. E.g. If a venue has been offered free of charge, you can look at hire charges for similar venues to get an estimate of the "in kind" value.

6. Added value the project has created:

True value of the project impact (from 4)	£50,856
Minus Full cost of the project (from 5)	£42,720

Therefore the net social return or "added value" of the project = £8,136

By dividing the true value by the full cost (£50,856/£42,720), this can be expressed as a ratio: The project has a social return of £1.19 for every £1 invested the project or as a net social return percentage of 19%.

Part 3

This stage of monetisation covers projects that have financial impacts that will continue into the future after the project is over. It is used to adjust the true financial impact of the project used in Part 2 to take into account the fact that receiving money sooner is more valuable than receiving it later.

Note that not all project evaluations will need to complete this part as it only applies where impacts are expected to continue after the project is over and where the scale of the project justifies the cost of completing Part 3.

1. Estimate the number of years the impact of the project is expected to continue (outcome duration) after the project has ended
2. Explain the basis on which you have decided the impact will continue e.g. this can be based on long term research elsewhere or by asking people.
3. Establish whether, after the project has finished, the impact will have a percentage drop off after the first year as the initial effect of the project wears off and comes to an end. This information can often be found by looking at similar projects that have taken place in the past and elsewhere.

Present Value is an economic term used to show what money received in the future is worth today. A more detailed explanation can be found in Appendix 2 of the Guide.

Example – Present Value

The present value is calculated as the true financial impact of the project calculated in Part 2), divided by the "discount factor". The total "present value" of the financial impacts shows the impact of the true project impact taking account of where income is received in the future.

A one year project has a true financial impact of £1,000 per year and this is expected to last during the duration of the project and for two years after it finishes. However the impact is expected to drop off by 10% each year. Year 1 is the year of project activity.

	Year 1	Year 2	Year 3	Total
Monetised outcome	£1,000	£900	£810	£2,710
Discount factor	1.000	1.035	1.071	
Present value	£1,000	£870	£756	£2,626

In this example, the total present value is £2,626.

The discount factor used above is used by Government and is based upon an annual discount rate of 3.5%. Since this area can be complex it is recommended that these discount factors are used if Part 3 is relevant for your project.

Introduction

Structure your report around the aims and objectives of your project.

Write a brief description of your project.

Outline what you are trying to achieve and the stakeholders involved.

Show how the project came about.

Explain why you wanted to do the project.

Describe briefly what is going to be in the rest of the report.

Use Plain English to maintain accessibility for as many people as possible.

Avoid using jargon but make sure any precise terms can be understood by the person reading the report.

Tip: It is much easier to write the introduction after the rest of the report has been finished.

Main body of the Project report

Explain what you did and if the project met its objectives

Take each objective separately and discuss how the impact/outcome occurred and the stakeholders affected.

Assess all the data you have analyzed and put the information into the relevant part of the report.

Ignore details which add nothing to your report.

Use charts/spreadsheets or tables you created earlier.

Illustrate numerical data from your quantitative analysis and explain the indicators and values used, and data sources.

Highlight the main points by using bullet points under your charts or tables.

Show why unexpected outcomes occurred.

Explain what you would do differently with your next project and why.

Use quotes from your observational research to bring to life the spirit of the project

Conclusions

Sum up the achievement of your project.

Note what could have been done better.

Outline what has gone well.

Describe concisely whether the project met its aims.

Show briefly what the preceding sections tell you.

Do not add anything new in this section.

Summary

Structure this summary to match the order of the report. This will make it easier for anyone to find more information about the project.

Highlight all the key points from your project.

Mention each of the impacts/outcomes separately.

Re read the full report.

Ensure that this summary covers everything as some funders may only have time to read the summary on its own.

Annexes

Include extra documents in this section to support your evaluation report.

Give details of your methodology.

Show how you selected your sample participants.

Provide copies of questionnaires and topic guides.

Give brief details of how you analyzed your data.

Supply relevant databases and spreadsheets.

Example content of an evaluation report

1. Summary
This section should be written last to reflect the content of the full report. It should provide a brief summary of all the key information as some people will only read this part of the report. People will refer to the full report for more in-depth information.

2. Introduction
This should be a brief outline of the project. Describe what the project is about, what the aims of the project are and what you hope to achieve. Introduce what will be in the rest of the report.

3. The project
Under this heading you need to describe the nature of the project and how the work was undertaken.

4. Aims and Objectives
In this section you need to describe the aims and objectives and how well each has been met as well as what the outcomes of the project were.

5. Outcomes
In this section you should describe the project outcomes and explain how they came about and how long they are expected to last. Use the quantitative and qualitative data to illustrate the outcomes. Use charts or tables to illustrate results. Use quotes from observational data to bring the project to life. Describe values used to monetise impacts and their data sources. Explain your assumptions and it may be relevant to consider what would happen if these assumptions were different (sensitivity analysis).

6. Unexpected outcomes
Here you need to describe any unexpected outcomes, why they occurred and whether they are good or bad. Note any lessons learnt and whether things should be done differently next time.

7. Conclusion
This section should pull together the key data from the project.
Describe the strengths and weaknesses of the project.
Describe the project's achievements. Briefly mention what the preceding sections of the report say. Briefly mention the aims and how well they were met. Do not add anything new to this section of the report as it should reflect an overall picture of the project.