



# PROVE & IMPROVE

A Self-Evaluation Resource for  
Voluntary and Community Organisations



# COMMUNITY EVALUATION NORTHERN IRELAND (CENI) IS A UNIQUE SUPPORT ORGANISATION PROVIDING A RANGE OF SPECIALIST EVALUATION AND TRAINING SERVICES TO THE VOLUNTARY AND COMMUNITY SECTOR, STATUTORY SECTOR AND FUNDERS.

## Mission

To enhance the effectiveness of the voluntary and community sector through a better understanding and use of evaluation

## Aims

- Promote a broader awareness and understanding of evaluation
- Develop knowledge and skills in evaluation
- Assess performance and contribute to organisational learning
- Inform policy and practice in the conduct of evaluation

## Services

- Information and advice
- Training and support
- External evaluation
- Research and development

# FOREWORD

At Big Lottery Fund we focus on communities and those who are most in need. Through the programmes we deliver and our outcomes focused approach, we strive to be a more 'intelligent' funder, by supporting projects that make a real difference. We have a role in supporting change and funding projects which build the infrastructure, skills and capacity of the voluntary and community sector.

We are delighted that through our funding, CENI has been able to work with Voluntary and Community Sector organisations to help them better understand and use evaluation. CENI has offered a range of support mechanisms and worked with smaller groups to raise awareness of self-evaluation and develop capacity to use their skills when planning and managing projects. Through this work CENI has been able to help groups develop their own capacity. This means identifying what outcomes might be set, followed by monitoring and assessing the impact of that work. This ultimately helps in planning for their sustainability.

I welcome this publication and hope that Prove and Improve will be a helpful resource for a variety of organisations. The guide will assist groups to illustrate the effectiveness and efficiency of the projects and programmes that they deliver.

As funders move towards this more evidence-based approach we want to support groups, not just to demonstrate the impact of their activities, but also to help them plan and deliver at a time of change in Northern Ireland.

CENI are delivering and supporting real change; I hope this publication will enable others to benefit, and that valuable learning can be shared.

**Breidge Gadd**  
Northern Ireland Chair  
Big Lottery Fund



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# INTRODUCTION

## THE EVALUATION TRAINING AND DEVELOPMENT PROJECT

The Evaluation Training and Development Project was set up in 2005 in response to a changing policy and funding environment, which was beginning to place new evaluation demands on the voluntary and community sector. It provided training and support to organisations in the sector - especially ones with limited resources - to help them to understand and use evaluation to improve and develop their services.

The Project included the development of an integrated package of training modules, based on CENI's own self-evaluation model which has been widely used within the sector as well as within statutory/public service provision. The model takes projects through the process of 'doing it themselves', breaking self-evaluation down into a series of logical steps and stages.

It places a particular emphasis on outcomes. This reflects a growing focus on outcomes funding in the sector, with funders increasingly requiring evidence that their investment achieves maximum benefit. Right from the planning stage, organisations have to be able to demonstrate the needs they are trying to address and the anticipated outcomes from their activities. It is therefore important that they understand how to identify and measure outcomes within the context of their work.

## WHAT DOES THE GUIDE INCLUDE?

The guide reflects the core components of training which were developed and delivered through the Project. It includes:

- Resources and materials used in the training
- Examples, case studies and feedback from people who took part
- Signposting to further evaluation support.

It is intended to provide a starting point for exploring evaluation - and in particular, self evaluation of outcomes - and for thinking about some of the issues involved in this essential area of developing and running a successful project.

# WHAT IS IT ALL ABOUT? INTRODUCING EVALUATION



Evaluation is something we do all the time, often instinctively. Our views on the latest episode of Eastenders, or our favourite football team's performance at the last game often become a theme for discussion with friends. We do this without thinking about the evaluative processes involved. We make assessments at a number of levels, and, on the basis of various criteria, arrive at a judgement on the value or worth of something. These judgements often have an impact on the decisions we make - do we keep watching Eastenders or decide to support another football team?

As managers, staff or volunteers with responsibility for managing and delivering activities, we have to apply this to our work too. We need to think about building in formal evaluation processes from the start of funded projects, and ensure that progress is regularly reviewed, in order to inform future planning and delivery.

#### EVALUATION - WHAT IS IT?

Evaluation is distinct from monitoring. You may be more familiar with monitoring to meet funders' requirements.

**Monitoring** involves on-going recording and gathering evidence on activities in a systematic way. It may include recording the type of activities delivered, the numbers attending, or feedback from users.

**Evaluation** goes beyond collecting evidence to a more structured process of review. It involves making a judgement, comparing what was achieved with what was originally planned, exploring the reasons why things happened as they did. It usually includes making recommendations for future development or change. Monitoring information can feed into the evaluation process and inform these assessments.

#### BENEFITS OF EVALUATION

Evaluation can have a number of benefits. It helps to:

- **Document and record** what is being done and how, who is benefiting and in what ways
- **Improve practice** as you reflect on what works or doesn't work so well
- **Plan more effectively** as you use the learning to inform future development of activities
- **Enhance accountability** to funders and other stakeholders
- **Support sustainability** as you can demonstrate and evidence achievements
- **Share learning** about experiences, both internally and externally

#### THINK!

- Why is evaluation important for your group?
- What are you already doing to monitor and evaluate your work?
- What are some of the challenges, and how might you address these?

# GETTING READY: SOME QUESTIONS

It is important that you prepare for evaluation from the beginning of your project, thinking clearly about what you want to do, and how you are going to do it.

## WHY DO YOU NEED TO EVALUATE?

You need to consider the **main purpose** of evaluating your project or organisation, and think about how you will use an evaluation. You may have a number of needs - to meet a funder's requirements, to help with future planning or to learn from what you do, for example. Evaluation can often serve several different purposes simultaneously, and meet the needs of a range of stakeholders.

## WHO IS THE EVALUATION FOR?

Often the main focus of evaluation is to meet a funder's requirements. However, there are other **stakeholder perspectives** to consider; for example, management committee members, staff, volunteers, participants, partner organisations, the local community and policy makers. Stakeholders may have different priorities, and it is best to consider these at an early stage. You might want to set up a subgroup to oversee and plan for the evaluation needs of your project, and ensure that you reflect this diversity.

## WHAT WILL YOUR EVALUATION FOCUS ON?

Evaluation can cover a range of issues. It is useful at the outset to identify a set of **questions** that you would like the evaluation to answer. It might be a good idea to put down a list of these, and then refine and prioritise them, bearing in mind the purpose of the evaluation and the needs of stakeholders. However, it is important to be realistic about the scope of the evaluation - it may be better to focus on a few areas and do them well than try to take on too much.

## WHEN SHOULD THE EVALUATION BE DONE?

Evaluation is often left until the **end** of a project; however, it is important to think about it from the **beginning**, so that relevant information can be collected throughout the lifetime of a project. You might want to carry out evaluation at **key points** in time - for example, at an interim or midway stage - to allow you to track progress and make any changes needed to bring the project back on track. This also enables you to gather feedback on an ongoing basis - it can sometimes be difficult to consult with participants after their involvement with a project has ended.

If you are planning to use the evaluation to inform external stakeholders, such as funders, you will need to work back from any agreed reporting deadlines, and ensure that you allow plenty of time for writing up a report. It always takes longer than you think.



## HOW WILL THE EVALUATION BE DONE?

**Self-evaluation** is when the organisation or project seeks to understand and assess the value of its work, using its own staff and skills. It involves planning for evaluation from the outset, trying to anticipate what information will be needed, putting in place the mechanisms for collecting data and then analysing and using this to help with future development.

**External evaluation** involves commissioning support from an external source to conduct an evaluation. This can provide an objective assessment of your project by a consultant who has the knowledge and skills to carry out the necessary tasks.

There are pros and cons to both approaches, and organisations often combine elements of doing it themselves with external evaluation support to lend some objectivity to the process. You will need to decide on the best approach for your project, and consider the implications - including costs and time - of this decision.

## PREPARING FOR EVALUATION: EXPERIENCES OF PROJECT PARTICIPANTS

*'Thinking about the evaluation early in the life of the project and what we needed to know ensured that we were clear about the information we needed to collect. This meant time was saved as we gathered it as we went along. This made the process so much easier.'*

**Mentoring Project**

*'We wish evaluation had been considered from the start. It has taken us a lot of time to look at the requirements for evaluation and go back through old files and reports to pull it all together. Since attending the training, we will be implementing these processes more in future!'*

**Drug and Alcohol Support Group**

*'Evaluation is a regular action each term, rather than being adhoc or funder driven.'*

**Women's Centre**

## THINK!

Think about these questions for your own project:

- Why do you need to evaluate? How will the evaluation be used?
- What areas of work should you evaluate?
- What should the role of other stakeholders in the evaluation process be? How could they be involved?
- How will the evaluation be carried out? What are the resource implications of this decision in terms of time, costs and personnel?
- When will the evaluation be carried out?

# CENI'S SELF-EVALUATION MODEL

This guide focuses on self-evaluation, and for those groups which decide to follow this route, CENI uses a model which breaks the process down into a series of logical steps and stages. The aim of the model is to enable organisations to carry out self-evaluation using a structured, rigorous approach.

## Planning

- Identify anticipated achievements
- Establish indicators of success
- Identify evidence required
- Agree data collection methods

## Collecting evidence

- Collect data

## Analysis

- Analyse information
- Make recommendations

## Reporting and using

- Feedback findings
- Implement recommendations

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# Planning

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# PLANNING FOR SELF-EVALUATION

Planning well, before you begin to gather information, is essential. This helps to establish clear boundaries for the self-evaluation process, and agree on what needs to be measured and how. You will find it useful to develop a **self-evaluation plan** which covers four key areas.

Identify anticipated achievements What is your project trying to achieve?	Establish indicators How will you measure success?	Identify evidence required What evidence do you need to collect?	Agree data collection methods How will you collect the evidence?

## DEVELOPING A SELF-EVALUATION PLAN: EXPERIENCES OF PROJECT PARTICIPANTS

*'The plan is useful as it helps you to be able to break things down so you don't go off on a tangent... it helps us to be specific and narrow down what we want to achieve.'*

Residents Group

*'Using the plan has helped us identify two areas which needed improvements and these improvements have been implemented.'*

Playgroup

## CASE STUDY: OLD WARREN PARTNERSHIP

The Old Warren Partnership provides a range of activities to its local community, including pre-school, youth and adult services. The organisation already carried out monitoring and evaluation, although this was very focused on meeting the requirements of funders. As a number of projects within the Partnership were drawing to an end of their current round of funding, they were collating information for evaluation. Staff used the evaluation plan to revisit what they had intended to achieve when they had originally applied for funding, ascertain what information they had gathered and assess any gaps in data. As well as reviewing and reflecting on the past, the plan was used to support future planning for the Partnership. Identifying outcomes helped to move the focus away from a purely operational level to a more strategic consideration of what they were trying to achieve. In this way, it helped them to consider how activities on the ground were linked to the project's vision.

# IDENTIFYING ACHIEVEMENTS: A FOCUS ON OUTCOMES

Central to the self-evaluation plan is the idea that you need to be able to state clearly what your project is trying to achieve. You might want to think about this across a number of different dimensions of your work.

Outputs - what you will do	Quality - how these are delivered	Processes - ways of working
For example, <ul style="list-style-type: none"> <li>■ Tangible activities, events, products or services that you will deliver</li> </ul>	For example, <ul style="list-style-type: none"> <li>■ User satisfaction</li> <li>■ Usefulness of activities</li> <li>■ Appropriateness to need</li> <li>■ Effective targeting of services</li> </ul>	For example, <ul style="list-style-type: none"> <li>■ Partnership working</li> <li>■ Involving stakeholders</li> </ul>

All of these are useful to explore, but, in the current funding environment, it is increasingly important to think about **outcomes**.

## WHAT ARE OUTCOMES?

Outcomes are the benefits or changes which you envisage as a result of your work.

They may be expressed in positive terms - 'to increase knowledge' - or negative terms - 'to reduce incidents of crime'. They may also be about maintenance - 'to maintain positive community relationships' or prevention - 'to prevent accidents in the home'.

Anticipated outcomes are planned from the beginning; you define the outcomes you expect from your project at the start, based on evidence of needs amongst your target group. You may also find that your work has unanticipated outcomes - either positive or negative - which emerge as different factors impact upon the project as it progresses from its initial planning stage.

The terms 'hard' and soft' are sometimes used in relation to outcomes. Hard outcomes are quantifiable, and therefore considered to be more objective; for example, homeless people are housed, unemployed people gain employment. Soft outcomes are often less tangible, and may include things like increased confidence, improved self-esteem or changed attitudes. While they rely on more subjective evidence - for example, reported feedback from users - and can be seen as difficult to measure, they give a much fuller picture of what is going on behind the numbers, and the successes of the project.

Outcomes happen over a period of time. Sometimes when you deliver activities there are immediate outcomes; for example, new knowledge and skills gained through training. You may then wish to track changes further down the line, to check to what extent learning has been implemented and how it has impacted on participants. Progression from the point of initially engaging with an activity, through to achievement of the desired outcome at the end, is sometimes referred to as 'intermediate outcomes' or 'distance travelled'. This acknowledges that not all participants start at the same place and that there are steps or milestones along the way which are important to record, even if the final anticipated outcome is not always achieved.

**Distance travelled - an example**

An employability project targets women in a local area. As a first step, women access the project activities...

- ... they engage in personal development programmes...
- ... they gain confidence and enthusiasm for further learning...
- ... they progress onto further employment-focused training...
- ... they gain new skills...
- ... they are more employable...
- ... they secure employment.

**BENEFITS OF EVALUATING OUTCOMES**

There are a number of benefits to be gained from focusing on outcomes:

- Increased clarity about the changes you are trying to achieve
- Greater understanding about how your activities help to achieve change
- More effective planning to achieve the desired outcomes
- Being more client-focused rather than activity-focused
- Increased motivation for staff as they see evidence of change
- Potential to demonstrate how your work contributes to meeting funders' priorities



**SOME ISSUES WITH OUTCOMES**

Issue	Response
Establishing direct causal links between activities and outcomes - sometimes called 'attributable' outcomes	You may not be able to scientifically prove direct causal links, as external factors do influence outcomes. However, you can demonstrate change by drawing inference from the information available. Gather feedback from different sources, use various methods and compare your findings. While control groups are sometimes used, there are methodological and ethical issues to consider with these.
Capturing outcomes can be time-consuming and resource-intensive	Planning well from the start and focusing on a manageable number of key outcomes is important. Ensure that data-collection links clearly to evidencing these outcomes. Build in systems for gathering information along the way and share the tasks amongst staff and others.
You cannot control the outcomes of your activities, or negative outcomes may emerge	While it is difficult to control the outcomes of any particular activity, careful planning (sometimes based on research or other evidence) will help to identify the best strategies to achieve the desired change. Part of the evaluation process is to identify what works best, and reflecting on this will enable you to make changes which help the project progress towards its goals.
Outcomes take time to achieve and the project may only have short-term funding	Be realistic as you plan your project's outcomes. Your target group may have multiple or complex needs, so you must be specific about what you will achieve within the timeframe, bearing in mind the level of resources and type of support being provided. It will also be important to consider distance travelled and capture intermediate outcomes.
Some outcomes are more difficult to measure; for example, preventative work, campaigning	Gather evidence on the contribution made to achievement of the outcomes. Consult with different stakeholders to get reported evidence of benefits, and use a range of methods to obtain a full picture.

# MEASURING SUCCESS: SETTING INDICATORS

Having identified outcomes, you need to think about measuring success.

Different terms are used when talking about this - 'performance measures', 'performance indicators', 'targets', or 'indicators of success'. Essentially, when conducting evaluation we need to have some criteria or indicators on which to base judgements about success.

Indicators may be:

- **Quantitative**, relating to numbers or amounts
- **Qualitative**, relating to reported change or perceptions of change

Indicators should be:

- **Meaningful** - ask yourself 'how useful is this indicator?'
- **Specific** - consider 'who will benefit and in what specific ways?'
- **Measurable** - think about 'if it is not quantifiable, in what other ways will we be able to demonstrate achievements?'
- **Realistic** - consider 'is this realistically achievable in terms of the resources available and the level of intervention our project makes?'
- **Negotiated** - think about 'do we need to agree the indicators with our stakeholders?'

## THINK!

Take some time to think about your outputs/activities and outcomes; you may find it useful to list them side-by-side in a table.

Outcomes that you want to achieve	Outputs - what you will do to help you achieve this outcome
Outcome 1	
Outcome 2	

## CASE STUDY: THE ACTIVE GROUP (TAG)

TAG is a social group for adults aged 18-30 with a learning disability. The group was coming to the end of three-year funding from the Big Lottery Fund, and wanted to gather evidence on the difference they had made to their members. The staff found that while they had identified anticipated and longer-term outcomes, it was important to also reflect on **unanticipated** outcomes which had emerged as a result of the project.

These included:

- **Support for parents and information in relation to benefits and other resources available**
- **Befriending relationships developed with volunteers**
- **Increased knowledge for parents on issues relating to the rights of disabled people**
- **Knowledge and skills gained for members by attending some informal courses.**



## THINK!

Having identified outcomes for your project, think about the ways you would measure success. List some indicators for an outcome you have identified. Keep it manageable - perhaps up to 3 indicators for each outcome.

Outcome - what you will achieve	Indicators - how you will measure success

EXAMPLE: Employability project - Essential Skills Programme

Outcome	Indicators of success
Improved essential skills of marginalised young people in the Ashtown area	The number of young people accessing essential skills courses and percentage completing
	Qualifications gained in literacy, numeracy, communication, interpersonal and ICT skills
	Young people report that new skills have helped them in their day-to-day life

OUTCOMES AND INDICATORS:  
EXPERIENCES OF PROJECT PARTICIPANTS

*'In the past, if I was asked what we are doing, I would have said 'everything' but now we're clear that with youth, for example, we are working on personal communication, recreation and environmental issues... the training helped us to identify more qualitative outcomes which we wanted to measure but we felt hadn't been covered before.'*

Community Organisation



# Collecting Evidence

# COLLECTING EVIDENCE: METHODS AND TOOLS

Having identified outcomes and indicators, you will need to identify the different types of evidence required to help you measure success.

Examples of **quantitative evidence**:

- Number and type of participants - age, gender, ethnic background
- Number of activities delivered

Examples of **qualitative evidence**:

- User satisfaction with services provided
- Participant feedback on benefits they have gained from the services

You also need to consider the methods and tools you will use. A **method** is the approach you will take to gathering information (for example, surveys, observations, records); a **tool** is the specific instrument to be employed (for example, a questionnaire or observation sheet).

## WHEN SHOULD YOU COLLECT EVIDENCE?

Evidence may be gathered at various times but, ideally when measuring outcomes you will need to capture information at the **start, during and at the end** of the project to show how participants have progressed. Information gathered at the start provides the baseline position. You may wish to gather **baseline** information on a range of areas depending on the nature of your project; for example:

Employability project	Participants' existing knowledge, skills, qualifications
Community relations project	Participants' prior attitudes towards other communities
Community-based cancer service	Number, nature and type of cancer care services in a local area at the start of the project
Health promotion project	Health and lifestyle attitudes and practices of participants prior to engaging with the project

You can design tools to capture this information at the beginning of the project, and then reuse these tools at a later stage to compare progress. By analysing this data, you should be able to present evidence of change and draw conclusions on the effectiveness of the project in achieving the desired outcomes.

## METHODS FOR COLLECTING EVIDENCE

A number of methods may be used to gather evidence for evaluation, and you will probably use a combination of these. In choosing a method, it is important to think about its appropriateness for the setting you are working in, and ensure that it is sensitive to the type of service users - children, or people with special needs, for instance. You also need to bear in mind the information, including monitoring data, which already exists within your project and make use of this.

## DOCUMENTS AND RECORDS

Records are often kept throughout the lifetime of a project and are an important reference for evaluation. Types of records include:

- Plans - strategic, operational, project
- Funding applications
- Reports - progress, annual, financial
- Minutes of management and staff meetings
- Promotional literature
- Programmes of events
- Activity records - date, number of users
- Client records / contact details / databases
- Staff diaries / logs
- Case notes
- Correspondence
- Press releases / clippings

Some questions to consider when using internal documents for evaluation

- How relevant is the information?
- Is it good quality?
- Is it easy to access?
- Are there data protection issues?
- Are there issues of confidentiality?

## QUESTIONING

The main approaches to questioning include:

- Interviews
- Focus groups
- Questionnaires

Questions may also be administered through, for example, self-assessment tools and evaluation sheets.

**Interviews** allow you to gather in-depth information from stakeholders. However, they can be time-consuming, and require the interviewer to know how to ask probing questions, give clarification where required, avoid prompting the answers and have good listening and recording skills.

**Focus groups** allow you to get feedback from a number of people at one time and may therefore be more time and cost-efficient. The facilitator needs to be aware of group dynamics to ensure a balanced representation of views, and a reliable record should be made of the discussions.

**Questionnaires** are one of the most commonly used methods of data collection, and usually provide a level of anonymity for respondents, if this is required. However, you need to consider if a questionnaire is the most effective tool for the circumstances, and for getting the information you need.

#### SOME TIPS ON QUESTIONNAIRES

- Decide who the questionnaire is aimed at, what you need to know, and how you will administer it; for example, a postal questionnaire or one-to-one
- List the topics you wish to investigate, then prioritise and sequence them in a logical order, starting with the easier questions
- Decide on the question type - for example, open or closed, ranking in order of preference or scales - or a combination
- Test the questions to make sure they read clearly, and avoid:
  - Unfamiliar words/phrases /jargon/ long questions
  - Ambiguous questions
  - Overly direct questions
  - Questions that depend on memory
  - Double questions
  - Leading questions
- Assemble the questionnaire, bearing in mind that appearance is important, and include clear, concise instructions about how to complete it
- On a postal questionnaire, include a 'return by' date and address
- Consider what sampling strategy you will use
- Is ethical approval required?
- Think about resource implications (photocopying, postage costs)
- Monitor the response rate - one third is recommended - and send out reminders if necessary

#### OBSERVATION

Observation involves watching, recording and analysing events of interest, and may be formal - using a structured observation sheet - or informal. It is often under-utilised in evaluation and is sometimes thought to be open to bias or too time-consuming. However as with other methods, it does depend on how you choose to implement it. Observation is particularly useful when working with groups where written data collection may be inappropriate - with young children, for instance.

Areas for observation might include:

- The physical environment that the group is working in
- Individual or group interactions
- How people engage with activities
- Non-verbal signs / atmosphere / culture
- Observable changes in participants

#### CASE STUDIES

These enable you to understand a case in greater depth. They take account of the unique context of an individual case, and can paint a holistic picture of the intervention made by your project. A case study is particularly useful for capturing outcomes and distance travelled, where it can be used to tell the story of individuals, families or groups. In identifying a case study you might consider how you want to use it - for example to illustrate a 'typical', 'unique', or 'special' example.

#### THINK!

In planning for gathering evidence you will need to consider:

- What type of information do you need to collect?
- What methods and tools will you use?
- Who needs to be consulted?
- Will you take feedback from a sample of users, or from everyone who participates?
- Who will be responsible for collecting the information?
- Are any particular skills required - for example, questionnaire design, interviewing skills?
- What resources will be needed?

#### CASE STUDY: THE ACTIVE GROUP (TAG)

As a result of the training provided through the Evaluation Training and Development Project, TAG reviewed their methods for collecting information from project users. Previously, users had been asked at planning meetings for their opinions about past activities, and what they wanted to do in the future. However, it was evident that not everyone was willing to make their views heard. The Group subsequently implemented an 'evaluation wheel' to gain feedback on what activities they liked or disliked. Planning nights also include the use of a 'graffiti wall' - a sheet of blank flipchart paper and coloured pens - which provides an opportunity for users to decide what they want to make comments on.

#### CREATIVE METHODS

Depending on the type of project you are running, you may want to explore the use of some more creative methods for collecting information. These include:

- Use of technology
  - Video/video diary/Big Brother diary room
  - Emails/Web polls/texting
- Photography
- Creative writing/art/cartoons/poetry/story-telling/drama
- Graffiti walls
- Evaluation wheel
- Evaluation tree
- Comments book/suggestions box
- Comments cards/post-it notes
- Quizzes

#### CASE STUDY: BELFAST COMMUNITY CIRCUS

Belfast Community Circus is a cross-community organisation which provides training and performance opportunities to young people. Given the nature of its work, and its target group, the organisation has adopted a range of approaches to collecting data which can be used to review previous activities, as well as inform future development. It is important that the methods used reflect the ethos of the Community Circus, building on the interactive, trusting relationships which have been developed between project facilitators and participants. One example is the use of peer interviews, where young people gauge each other's views using a questionnaire format, and then feed back the information to the wider group. The information gathered through this has been used not only to evaluate activities, but also feed into a future funding application.

#### METHODS AND TOOLS: EXPERIENCES OF PROJECT PARTICIPANTS

*"Since attending the training we have designed the feedback forms so we receive more appropriate feedback and, as a result, have a more significant number of forms completed and returned."*

women's centre

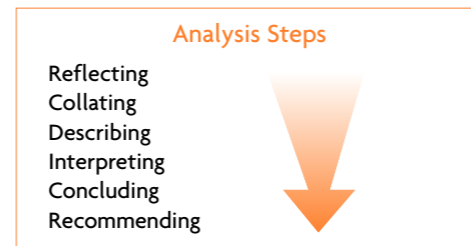


# Analysis

# ANALYSIS: MAKING SENSE OF INFORMATION

Analysis involves making sense of the information you have collected, and using it to help inform the future development of your work.

Sometimes this can be the most daunting part of self-evaluation. You may have recorded lots of data about your project and gathered feedback from various sources, but are not sure how to bring it all together in a useful format. You might find it useful to think of analysis as a series of steps, through which you filter and distil the body of evidence you have collected.



## REFLECTING

Begin by thinking back to your evaluation questions - why are you doing the evaluation, who is it for, and what do they want to know about your project? You need to think too about your outcomes and indicators of success; a key question will be 'did the project achieve what it set out to do?'. With this in mind, you can begin to collate your data.

## COLLATING

This involves bringing together the information into a workable format. Quantitative data can be organised through statistical analysis, using some basic calculations - total numbers, averages, percentages of the total, for example. Computerised packages such as SPSS and Microsoft Excel can help with this, and enable you to present data in user-friendly charts and graphs. Qualitative information needs to be organised thematically; the term 'content analysis' is used to describe the process of identifying key themes or patterns.

## DESCRIBING

The emphasis here is on providing a description of the facts which have emerged from the collated information - what was delivered, how much, who to, when and where, as well as the effects on and experiences of participants. This needs to be presented in a balanced, fair way, reflecting both positive and negative points.

## INTERPRETING

Interpretation goes beyond describing the facts, to understanding their significance and exploring why things happened as they did. You will need to look at internal and external factors which contributed to the project's achievements, as well as consider the challenges or difficulties encountered.

## CONCLUSIONS AND RECOMMENDATIONS

Based on your interpretation, you need to draw out some conclusions about the strengths and weaknesses of the project in achieving what it set out to do. You can then begin to make recommendations for building on these strengths and addressing areas for improvement.

## AVOIDING BIAS - GOOD PRACTICE

When conducting analysis for self-evaluation, it can be difficult to be objective and distance yourself from your role as a practitioner who has direct involvement in the project. Some see this as one of the disadvantages of self-evaluation. However, there are things you can do to help to minimise bias:

- Use coding and labelling to make the data more anonymous
- Focus comments on results rather than your own views
- Use different sources and types of evidence to support your conclusions
- Discuss findings with colleagues / stakeholders - do they agree with you?
- Be open to different understandings and exceptions to the general rule

## MAKING SENSE OF INFORMATION: EXPERIENCES OF PROJECT PARTICIPANTS

*'In the past we simply asked participants what they thought about the activity or the event. Now we are trying to get away from the quantitative and ask about change. We ask them to think about how they would have reacted to a situation when they first started and how they react now. We get good feedback from them ... we now have evidence for what we knew was happening as a result of the project.'*  
Community Arts Organisation





# Reporting and Using

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# REPORTING AND USING

Reporting is an important aspect of self-evaluation and provides an opportunity to celebrate achievements and share learning. It is important, then, to take time to consider how you will communicate your findings.

## DIFFERENT WAYS OF REPORTING

One of the main ways is through a **written report**; in some cases, this may be published and circulated more widely. The main reason for reporting is to 'inform and influence'. You therefore need to consider your main **audience**, whether internal or external, and organise your report accordingly. A good report will be relevant to the needs of its audience, well-structured, concise and attractively presented.

## POINTS ON REPORT WRITING

- Have a clear purpose
- Plan your structure, and use a logical sequence
- Include information which is relevant and useful to your audience
- Ensure information is accurate
- Watch out for personal bias - avoid emotional statements or opinions not based on fact
- Be concise and keep it simple
- Use a writing style, appropriate to your audience

## Suggested structure for a Self-Evaluation Report

- Title page, including date of report
- List of contents
- Executive Summary - key findings, conclusions, recommendations
- Background information on the project - rationale, history, aims and objectives, activities, structures, funding
- Methodology - purpose of the evaluation, the questions it addressed, the methods used to collect information
- Findings and Analysis - the quantitative and qualitative evidence on the project, and what it shows
- Conclusions and Recommendations - the strengths and weaknesses of the project, and key actions to strengthen and improve it

There are other ways in which you can communicate learning with different target audiences - perhaps by organising an **event** or writing up key findings in a **newsletter** or on your **website**. You may also want to use more creative approaches - a **CD** or **DVD** for example - to disseminate information; these are not always as expensive as you may think.

## EXAMPLE: Dreams Art and Health Project

In our training, one example used to illustrate different approaches to presenting evaluation results is the Mater Hospital's Arts Care project, 'Dreams'. This was a participatory visual arts project developed by Arts Care at the Mater Hospital, which provided participants with the opportunity to create original prints around the theme of dreams. An external evaluation of the project used questionnaires, observation and interviews to measure its outcomes, and provided clear evidence that the arts activities relaxed participants, improved mood, and in some cases, alleviated pain and symptoms. It was important that these findings were presented in a visually artistic way, reflecting the core theme of the project. A summary report was produced, which included the findings and illustrated participants' artwork. Staff also worked with a team from the Nerve Centre to make a video which showed the project in action, and presented the evaluation results as straplines running throughout the production. The report and video were launched at an event in Belfast's Waterfront Hall, where the audience included health professionals as well as workers in the arts field.

## IMPLEMENTING AND USING YOUR SELF-EVALUATION

Reporting on your self-evaluation is not the end of the process. Having got to this stage, you need to take time to consider the recommendations which have been made, and set out a plan of action to carry these forward. Remember too, that self-evaluation is a cycle - you will need to keep up the momentum of planning what you want to achieve, measuring success and agreeing improvements or changes, to ensure that your project continues to be relevant and beneficial to all of your stakeholders.

# SIGNPOSTING

This section provides information about some of the available support in evaluation, as well as signposting to other useful documents and website materials. This is, of course, not an exhaustive list, and other resources are widely available.

## CENI TRAINING

CENI provides a range of training and support options:

- Open courses on a range of topics
- Customised training courses tailored to participants' needs
- Longer-term customised training and support to embed self-evaluation and quality systems.

Themes include:

### Evaluation

- Introducing Self-Evaluation
- Methods and Tools for Self-Evaluation
- Analysing and Reporting
- Getting the Most from External Evaluation

### Outcomes

- Introducing Outcomes
- Evaluating Social Capital Outcomes

### Quality

- Approaches to Quality
- Introduction to PQASSO (Practical Quality Assurance System for Small Organisations)
- Implementing PQASSO

Further details are available from the Training Manager and on the CENI website [www.ceni.org](http://www.ceni.org)

## SOME RELEVANT CENI PUBLICATIONS

The following reports are downloadable from the CENI website.

**Strengthening Services - Benefits and Outcomes of Self-Evaluation within Health and Social Care Provision**

Nicola McIlDoon, Orlaith Moley, CENI, June 2005

**Improving Practice - An Approach to Implementing Self-Evaluation within Health and Social Services**

Nicola McIlDoon, Orlaith Moley, CENI, 2002

**Evaluating Community-based and Voluntary Activity in Northern Ireland**

Mike Morrissey, Pat McGinn, Brendan McDonnell, April 2003

## SOME USEFUL WEBSITES

The following will provide links to a wide range of evaluation resources.

### Community Evaluation NI

[www.ceni.org](http://www.ceni.org)

### Charities Evaluation Services

[www.ces-vol.org.uk](http://www.ces-vol.org.uk)

### Evaluation Support Scotland

[www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk)

### UK Evaluation Society

[www.evaluation.org.uk](http://www.evaluation.org.uk)

In developing this guide, we also found the following useful.

### Big Lottery Fund

[www.biglotteryfund.org.uk](http://www.biglotteryfund.org.uk)

See research and evaluation section for examples which are downloadable; see also [www.reachingcommunities.org](http://www.reachingcommunities.org) for ECOTEC evaluation resources

### European Social Fund

[www.esf.gov.uk](http://www.esf.gov.uk)

Downloadable publication: 'Existing models for Measuring Soft Outcomes and Distance Travelled'

### Scottish Arts Council

[www.evaluationforall.org.uk](http://www.evaluationforall.org.uk)

Check out their evaluation toolkit

### Victims Unit, OFMDFM

[www.victimsni.gov.uk](http://www.victimsni.gov.uk)

See a Report on Ethical Principles for Researching Vulnerable Groups/Paul Connolly University of Ulster

### Voluntary Arts Network (UK)

(inc Voluntary Arts Ireland)

[www.vaireland.org](http://www.vaireland.org)

Includes a range of resources, publications and VAN briefings

### Voluntary Arts Wales

[www.vaw.org.uk](http://www.vaw.org.uk)

See 'Monitoring and evaluating your arts event' and 'Tear up your Tickboxes'

## SOME BACKGROUND READING

Arts Council England, 1999, Felicity Woolf,  
*Partnerships for Learning - A Guide to Evaluating  
Arts Education Projects*

BIG Lottery Fund, 2006, Sara Burns & Joy MacKeith,  
*Explaining the Difference Your Project Makes -  
A BIG Guide to Using an Outcomes Approach*

BIG & ECOTEC, 2007,  
*Evaluation Toolkit for Projects (Reaching  
Communities)*

Blackley S, Goddard M and Seymour H, 1997,  
*Project Monitoring and Evaluation:  
A Practical Guide*

CES 2003, Sara Burns and Sally Cupitt,  
*Managing Outcomes: A Guide for Homelessness  
Organisations*

CES 2003, Sara Burns, Sally Cupitt and Jean Ellis,  
*Your Project and Its Outcomes*

CES 2002, Lucy Bishop,  
*First Steps in Monitoring and Evaluation*

CES 2002, Jean Ellis,  
*Practical Monitoring and Evaluation:  
A Practical Toolkit*

CES 2002, Sara Burns,  
*Outcome Monitoring, Discussion Paper No 7*

CES 1993, Gill Whitting,  
*Developing Aims and Objectives*

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Scottish Community Development Centre  
(SCDC), 2001,  
*Learning, Evaluation and Planning - A Handbook  
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Alan Barr & Stuart Hashagen,  
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Health Development Agency, 2001, J Edmonds (ed),  
*Health Promotion With Young People, An  
Introductory Guide to Evaluation*

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*Measuring Impact, A Guide to Resources*

NIACE, 2005, Jan Elred; Jane Ward et al,  
*Catching Confidence - The Nature & Role of  
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Open University Press, 1999, Judith Bell,  
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*Social Research Methods (2nd ed)*

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*Outcome Frameworks - An Overview for  
Practitioners*

SAGE, 1997, Michael Quinn-Patton,  
*Utilization-focused Evaluation*

SAGE, 1990, Michael Quinn-Patton,  
*Qualitative Evaluation and Research Methods*

SAGE, 2000, Colin Robson,  
*Small-Scale Evaluation*

Urban Institute, 2004, Hattry & Cowan,  
*Analysing Outcome Information - Getting the  
Most from Data*

Urban Institute, 2004, Hattry & Cowan,  
*Analysing Outcome Information - Using  
Outcome Information - Making Data Pay Off*

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