PAUL HAMLYN FOUNDATION
EVALUATION RESOURCE PACK

IN ASSOCIATION WITH
THE NATIONAL INSTITUTE
FOR ADULT AND
CONTINUING
EDUCATION
(NIACE)

PAUL HAMLYN FOUNDATION EVALUATION RESOURCE PACK

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PREFACE

The Paul Hamlyn Foundation is one of the larger independent grantmaking foundations in the UK. Established in 1987 it has always been committed to enabling individuals to achieve their potential, with a particular emphasis on children, young people and others who are disadvantaged. Through its grant making and the extra support it gives to the organisations that apply for, or receive, funding, the Foundation aims to encourage the sharing of ideas, knowledge and leadership. Enabling the organisations it supports to take risks and try new approaches is equally important to the Foundation.

This pack has been developed with these objectives in mind. We hope that it will show you that there is a lot more to evaluation than simply totting up the numbers, important though this is. The pack emphasises the importance of capturing and documenting the personal development of the people you work for and gives you plenty of ideas about how to do so. The pack also encourages you to involve those you work for and your partners in planning, recording and assessing what you've done, to give them a genuine stake in the work. Finally, we hope the pack gives you the tools to show and promote the value of what you do to others in the field and to the people you want to influence.

This is not intended to be the absolute authority of evaluation. The approach and methods described are weighted towards the **participatory**, consistent with the approach taken by the Foundation in evaluating its Fund for Refugee and Asylum Seeker Young People (2003—2007). Indeed, the pack has been developed with considerable input from the projects supported through that Fund. They have contributed many of the creative methods for gathering evidence described in Chapter Three. They also have been enthusiastic 'testers' of the pack, which has been drafted and re-drafted in light of their suggestions. We are very grateful for these contributions.

We are particularly indebted to Jane Thompson, the author of the pack, who has done an exceptional job in drawing out, developing and writing about the methods and approaches that are being used by organisations on the front-line. The final result is a publication that is a pleasure to read. We hope it will be of use to the organisations we and others fund for years to come.

Susan Blishen, Programme Manager, The Paul Hamlyn Foundation

The National Institute of Adult Continuing Education (NIACE) is delighted to be associated with this resource pack on evaluation. We think it will appeal widely across the voluntary and community sector and make a difference to improving what we all do. NIACE, like the Paul Hamlyn Foundation, aims to increase opportunities for those who have least purchase on the system and to address issues of inequality and disadvantage. We also want to secure more opportunities for adults and young adults to learn, and better quality provision. There is little point in setting out to make a difference for people if the quality of what is offered never improves. That is why this resource is so important: we want to see the extraordinary made ordinary and the high quality which already exists in pockets spread out into every organisation. It is right that the authors have chosen to show how evaluation can be participatory and empowering; I would have expected no less from them. Jane Thompson leads NIACE's work on learners' voice and excellent it is too. The many ideas in this pack can already be found in practice somewhere: I commend them to you and hope you will want to try them out.

Dr. Peter Lavender, Deputy Director, NIACE

MAKING THE MOST OF THE RESOURCE PACK

The Paul Hamlyn Foundation Evaluation Resource Pack has been written for frontline workers and volunteers in the voluntary sector to help with evaluating their work.

In most cases the language of the pack is straightforward. Important technical terms used in the pack are **highlighted in the text** when they first appear and explained in plain English in the glossary that begins on page XXX.

The main aspects of **evaluation** are explained in simple terms and some examples of **best practice** are provided. The importance of early planning is emphasised and a range of methods are described to suit different needs. Choose the ones that are most relevant to you, to the size and resources of your organisation, and to the circumstances you are working in.

We encourage you to think positively about the purposes of evaluation. So often it becomes simply a routine affair to meet the demands of funders. But it should also help you to make sure that what you are doing is as good as possible for those taking part. Taking time to focus on what is working well, what needs changing, and what has surprised you – all adds to the learning and staff development of your organisation. And of course, the **evidence** you collect in the process will be invaluable when it comes to lobbying and campaigning for the issues and the people you care most about.
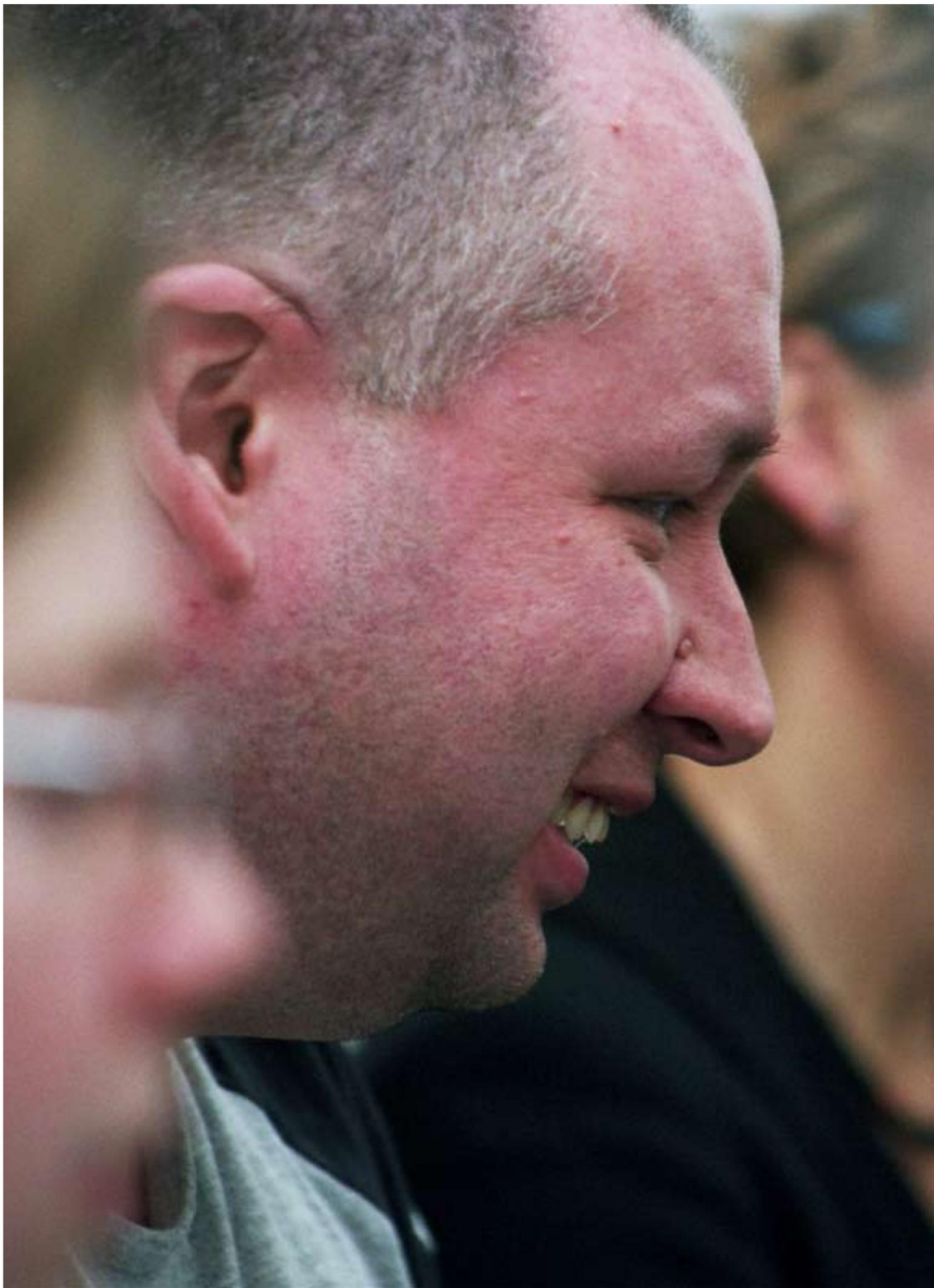
1 EVALUATION AND WHY IT MATTERS

Contents at a Glance

What is evaluation?

Evaluation is about gathering evidence to measure the value and quality of your project, so that you can show:

- what works and why it has worked;
- what hasn't worked and why;
- what has been done for those taking part;
- what difference it has made to individuals, groups, the wider community;
- what has been learned by staff and volunteers;
- how the money has been put to good use;
- what you would do differently next time.

Evaluation involves more than just describing what happened. It's a way of collecting evidence and analysing it so that you can demonstrate to others whether your project met or exceeded your expectations. The best evaluation sets out to be as honest as possible. Showing that you recognise, and have learned from, any mistakes is a good quality.

Why does it matter?

Evaluation is important for three main reasons. It will help make sure that you are:

- doing your best for those taking part;
- using the resources you have in a responsible way;
- learning from the process, in ways that improve, develop and sustain the work you are doing.

The evidence you gather during evaluation will be invaluable for three other important reasons. You can use the evidence to:

- convince your trustees or manager/s to sustain the work or try a different approach;
- help change and challenge public attitudes and influence public policy;
- support new bids for further funding.

What should be included?

What you include should relate closely to the aims and needs of your project and its various **stakeholders** – especially participants, project staff, partners, trustees and funders. In practice this means information and evidence about:

- the number of people involved in the project as participants;
- the work of the project team – meetings held, activities delivered;
- the views of the participants – looking at what they have learned or liked about the project; how the project has helped them individually, within their families or community and the wider society;
- the views of partners and agencies who have a special interest in the project;
- good practice – what has worked well;
- constraints - areas where the project has faced obstacles or barriers;
- problems encountered and how you have dealt with them;
- impact – how your project has made a difference;
- unexpected consequences;
- benefits to individuals, groups and communities;
- evidence of value for money.

However, it is really important to keep evaluation in perspective. Participants could be made to feel like guinea pigs if they are under constant scrutiny and subject to endless questionnaires and interviews. Projects provide an opportunity to take risks and try new things. Sometimes more can be learned from what went wrong.

Formative and Summative Evaluation

Two technical terms which it is hard to avoid are **formative** and **summative** evaluation. In simple terms, formative refers to the kind of evaluation that is ongoing and which encourages you to take stock of things as you go along. It's a useful way of learning from what is happening and of making adjustments to address any difficulties as they occur. Summative evaluation takes place towards the end of a project. The disadvantage of summative evaluation is if it takes place when a project is coming to a close, there may be no opportunity to implement the evaluation findings. The best kinds of evaluation make use of both formative and summative opportunities.

Quantitative and Qualitative Evidence

Evidence is the information you gather to make judgements about your project. It is often referred to as either **quantitative evidence**, meaning factual things that can be counted (such as the number of people participating in or completing an activity); or **qualitative evidence** which relates to how the project is experienced by those involved (revealed through personal testimonies, eyewitness accounts, video diaries, performances etc). A mix of both kinds of evidence make for the best kinds of evaluation.

In simple terms evaluation is about answering the question 'How do you know, what you think you know, and where is the evidence?' What follows will help you to do this with authority and creativity.

2 GETTING STARTED

Contents at a Glance

Make an early start and have a plan!

You need to budget for evaluation from the outset. You need to know how you intend to evaluate what you are doing and what sorts of **outcomes** you will be looking for. It's a good idea to have an evaluation plan in place at the very beginning of your project. There are five aspects to consider. Answering the questions on the following pages will help you to start putting together an evaluation plan. At each stage the check list will remind you about what's important. Some of the details will become clearer as you start collecting evidence.

Planning

- Why are you doing this project?
- What specific things do you want to achieve?
- How will you know whether or not you have succeeded?

CHECK LIST

⋯⟩ **Give someone overall responsibility for evaluation.**

⋯⟩ **Work out how long it should take (years, months).**

⋯⟩ **Work out how much it will cost in time and money.**

⋯⟩ **Build in regular (quarterly) meeting time to review how the evaluation is going and make any adjustments.**

⋯⟩ **Make sure project workers, partners and participants are clear about project aims and objectives including the outputs and outcomes they want to achieve and what their particular roles will be.**

⋯⟩ **Decide how you will measure success - in the short term and the long term.**

⋯⟩ **Be realistic.**

⋯⟩ **Secure the agreement of participants.**

⋯⟩ **Secure the agreement of partners.**

⋯⟩ **Be prepared to recognise and value any unexpected outcomes.**

Collecting evidence

- Who will be involved in giving and collecting the evidence?

- How will you collect the evidence you need?

- What methods of collecting evidence will best suit the way you work?

- When – in the lifetime of the project – will you use these methods?

CHECK LIST

- ⋯⟩ **Decide which evidence (such as the number of people participating in an activity or their personal testimonies) will be collected before, during and at the end of the project.**

- ⋯⟩ **Make sure the evidence relates to the kind of things that stakeholders need to know.**

- ⋯⟩ **Be sure the methods you have chosen fit in well with the values and size of your project.**

- ⋯⟩ **Be sure they are flexible enough to reveal unexpected outcomes.**

- ⋯⟩ **Make sure they are manageable, given the time and costs involved.**

- ⋯⟩ **Make sure they take account of equal opportunities and ethical issues.**

- ⋯⟩ **Secure the agreement of those providing the evidence that it can be used.**

- ⋯⟩ **Discuss how you will keep the data safe and confidential.**

Analysing and interpreting the evidence

- What does the evidence tell you?

- Are there any changes you could make in how you are collecting evidence?

CHECK LIST

- ⋯⟩ **Set aside sufficient time to collate the data you have collected (facts, figures, answers, feelings, experiences, happenings, etc) and to convert it into information.**

- ⋯⟩ **Be sure the information shows whether or not your original aims and objectives are being achieved.**

- ⋯⟩ **Include any unexpected outcomes.**

- ⋯⟩ **Make sure the quality of the data and the information will stand up to outside scrutiny.**

- ⋯⟩ **Make sure the methods for collecting evidence are giving you what you need. Make any necessary adjustments.**

Reflecting and moving forward

- What can you learn from the evidence?
- Are there any changes that would improve how the project is working?
- How will you do things differently in the future?

CHECK LIST

⤳ **Make a record of the key findings revealed by the evidence.**

⤳ **Make time for the various stakeholders to reflect on the evidence produced.**

⤳ **Compare your findings with other similar projects. Your funder may be able to help.**

⤳ **In light of what you have learned make the necessary decisions and changes.**

Reporting and sharing

- Who will you tell about the project and why?
- How will you tell them?
- What will you tell them?

CHECK LIST

⤳ **Arrange to share your findings with all those who took part.**

⤳ **Decide what methods of reporting are needed to satisfy the various stakeholders.**

⤳ **Decide who will do the reporting**

⤳ **Be sure to safeguard confidentiality and take account of ethical issues.**

⤳ **Identify who else should be told about the project.**

⤳ **Decide what they need to know.**

⤳ **Choose the best way of recording and presenting the findings of the evaluation.**

What to watch out for

Projects often get into difficulty when it comes to self-evaluation. The main problems lie in:

- defining objectives;
- agreeing who has responsibility for what;
- setting **targets**;
- planning – rather than simply cobbling together - the evaluation strategy;
- collecting accurate data and interpreting it;
- operating in an inclusive and participatory way;
- agreeing reporting procedures and developing effective methods of communication;
- combining formative and summative evaluation.

Internal Monitoring

Monitoring means collecting information, as systematically as possible, in order to keep an eye on progress, make changes as necessary, and to make sure everything is moving forward as planned.

You need to set up internal monitoring systems form the start of the project. Choose systems that are appropriate to the size of your project and the resources you have available. There is no merit in getting bogged down in complicated and bureaucratic record keeping. But on the other hand, your paperwork needs to stand up to external scrutiny.

Keep your records up-to-date as you go along. Catching up on records after the event is time consuming and more difficult to do.

It is useful to record:

- quantifiable targets;

- time-based targets;

- how project objectives are being met;

- resources (how much time and money is being spent).

Quantifiable targets

These might include:

- the number of events organised;

- the number of participants involved in different activities – such as open days, taster sessions, advice and guidance sessions, courses, home visits, crèches etc;

- the number of dissemination activities – such as presentations, written papers, seminars;

- the number of completed surveys and questionnaires;

- networking – for example visits, meetings, conferences.

Recording quantifiable targets is most easily done through devising a series of internal monitoring forms, completed on a weekly or monthly basis. Often project staff and volunteers don't like filling in forms, they say they would rather be working with project participants. But keeping accurate records is vital. Try to make them as simple and straightforward as possible. Funding organisations will sometimes want to see your monitoring forms, so keep them filed and up-to-date in a safe place.

Time-based targets

Time-based targets will be of greatest concern to the project manager who needs to know that agreed tasks have been completed on time and to the standard required. It is useful to record whether deadlines were effectively met because meeting deadlines frequently affects what is supposed to happen next. Consult with all those involved about whether agreed deadlines are realistic.

Meeting project objectives

Keep a record of how project objectives are being met as soon as the project begins to take shape. Project staff should be encouraged to record:

- the extent to which each objective is being met;
- how it is being met;
- what's the effect (on individuals, the group, the project, the community etc) of an objective being met;
- when problems occur, what strategies are being tried to continue the momentum of the project.

The best place to have discussions about meeting project objectives is usually in team meetings. External evaluators, if they are appointed, should be able to help with these discussions.

The project budget

The project manager will need to monitor the project budget. Some projects establish a financial sub-group, drawing on the expertise of partners or members of the project management committee. Issues for ongoing monitoring include:

- whether or not the budget is adequate to the needs of the project;
- regular reviews of the project's financial situation, with revisions agreed if appropriate or possible;
- the extent to which additional resources have been generated for the project;
- evidence of **value for money;**
- the **sustainability** of the project.

Monitoring forms

At the back of your pack you will find an Activities Monitoring Form (sheet 1) that you could adapt and use to record participation in one of your activities. It also enables you to record how the activity has contributed to specific project objectives. There is also guidance (back of pack, sheets 2 and 3) to help you decide what kind of forms you need to monitor each aspect of your work and on recording statistics.

3 CHOOSING APPROACHES AND METHODS THAT ARE RIGHT FOR YOU

Contents at a Glance

Good evaluation usually combines three or four different methods to gather evidence. Some methods are used to supply facts and figures (quantitative) others are better for recording people's feelings or experiences during the project (qualitative). A balanced mix of the two is usually most effective. Before considering which methods to choose (see below) think about what approach best suits your organisation and what use you will make of the evidence. Are you committed to **participatory** ways of working, for example? Do you want to appoint external evaluators?

Participatory Approaches

For some people, using participatory methods and approaches are simply a means to an end. For others, participation is indicative of democratic values and is important in its own right. The United Nations Development Programme (see back pocket, sheet 4), for example, identifies eight different levels of participation along a scale from merely nominal — which involves little that is meaningful — to transformative, which leads to people's empowerment and their direct and effective participation.

In simple terms choosing participatory approaches to evaluation means:

- **involving as many people as possible in the evaluation process, to create ownership and commitment;**
- **insisting on democratic and popular ways of working, using the kinds of methods outlined in this resource pack;**
- **developing good communication systems and feed-back mechanisms;**
- **making sure that information and recommendations are well supported with credible evidence;**
- **celebrating your achievements and learning from your experience.**

Empowering participants

Most voluntary and campaigning organisations say they are keen to involve participants in the planning, decision-making and evaluation of projects. But in practice, it often seems hard to do this well. Difficulties related to confidence, age, language and low self esteem are often given as the reason why professional workers find it hard to share leadership with volunteers and project beneficiaries. It is certainly much easier to operate projects through the roles of paid workers. But it is hard to see how participants' **capacity**, skills, confidence and self esteem can genuinely be advanced, in a sustainable way, if they are not encouraged to share in the leadership of their project.

Project participants have a lot to contribute. They know from personal experience about many of the issues your project is trying to address. Their friends and contacts are likely to take notice of what they have to say, if they feel themselves to be in the same boat. Their enthusiasm for your project and their achievement will act as an inspiration to others.

Here are some ways that you can involve project participants either now, or at some stage in the future.

⋯⟩ **AS ENTHUSIASTS** – talking to groups of local people (for example, at taster events or open days) about what the project is all about.

⋯⟩ **AS ROLE MODELS** – speaking on the radio, or telling their stories in the local press, in a way that encourages others by their example.

⋯⟩ **AS ACTIVISTS** – speaking on behalf of themselves and others to get issues aired and changes made.

⋯⟩ **AS SPEAKERS** – speaking at meetings or conferences. Project participants are often the best people to highlight important issues about work of the project to professionals.

⋯⟩ **AS REPRESENTATIVES** – acting as representatives in meetings with staff.

⋯⟩ **AS MENTORS** – befriending and advising newer recruits to the group until they find their feet.

⋯⟩ **AS FACILITATORS** – bringing people together to discuss ideas and issues, share knowledge, and build understanding within and between communities.

⋯⟩ **AS ADVISORS** – on evaluation/project steering groups, for example.

Nine tips for sharing leadership

This advice on sharing leadership with project participants has been drawn up by a group of learning champions involved in adult learning. It is based on their experience of sharing leadership roles with paid workers and could be relevant to your project participants.

- Work together. You can give each other support and share attendance at meetings and events as necessary.

- Know what you are letting yourself in for. Make the most of relevant training opportunities.

- Treat each other as equals. Recognise and respect people's experience and differing contributions.

- Don't be baffled by jargon. If you don't understand the words being used, ask for a translation.

- Expect good communication from the paid workers so that you get your questions answered quickly and accurately.

- Keep your ears and eyes open. You can learn a lot from people who are doing their jobs well – and also from those who aren't!

- If you are expected to read papers and attend meetings, make sure you get the papers in plenty of time. If they are hard to follow, ask someone from the meeting to help you make sense of them in advance. Better still, suggest that future papers be written more clearly, with 'non professional' readers in mind.

- Don't feel unable to take part in something because of cost. Ask your organisation to cover simple expenses such as food, travel and childcare, if this is relevant.

- You probably won't be able to do everything that is asked of you. Don't feel bad about it. There is always another day.

External Evaluation

This resource pack is intended to help you do your own evaluation of your project but in order to gather independent advice and constructive criticism you may want to call on the advice of an external evaluator. This needn't be particularly costly. Many funders will contribute to the cost of an external evaluation.

If you decide to appoint an external evaluator, you will need to draw up an evaluation tender. This usually includes:

- project aims, objectives and outcomes;

- a brief background to the project;

- the aims and objectives of the evaluation;

- the time scale for the evaluation;

- evaluation **milestones**;

- what is to be delivered;

- a request for specific information from the evaluation team;
  - details of their evaluation approach and methodology;
  - details of the relevant expertise and/or brief CV of those in the team;
  - previous experience of the team;
  - number of days and costs per day for each member of the team.

Having put the evaluation out to tender, it's a good idea to invite shortlisted applicants to discuss the evaluation process with the project co-ordinator and some members of the project team or management committee. This allows for useful discussion about the evaluation process, how it will happen, and what will be done. It will also give you some idea about whether the evaluator will work well with members of the project team and have a good understanding of the issues and background to your project.

The role of an external evaluator is to report back to project stakeholders and funders from an independent perspective about whether:

- the project has met its objectives, how and to what extent;

- the project is worth continuing or imitating elsewhere;

- the project has had an impact;

- there are lessons and experiences that can be learned or transferred to future projects.

It is usual for the evaluation team to provide you with:

- insights into the impact of the project and commentary on how well things are going;

- a contribution – in the guise of a critical friend - to the learning of all those involved in the day-to-day delivery of the project;

- interim evaluation reports at agreed intervals, commenting on specific aspects of the project;

- a final evaluation report that discusses whether and how the project has met its objectives, any barriers encountered, with relevant evidence and recommendations.

These are all things you will need to do yourself if you decide not to appoint an external evaluator. Here are some of the most obvious things to bear in mind when deciding whether internal, external or a combination of both kinds of evaluation is best for you.

Internal Evaluation

PROS	CONS
You know the context well and have a commitment to the work.	Project staff may not have the relevant evaluation experience or you may not be sufficiently self-critical because you want to present the project in a good light.
If you develop good systems, ongoing and unobtrusive evaluation can be part and parcel of what you do on a regular basis.	Too much self evaluation can get in the way of doing the work and making space for unexpected outcomes to emerge.
The costs of evaluation can be reduced by doing it yourselves.	Unless evaluation is budgeted for in terms of staff time and money it can easily get overlooked or left until the last minute

External Evaluation

PROS	CONS
Professional evaluators have a good sense of what is required by relevant stakeholders and know what they are looking for. They will have experience of a lot of different methods of data collection and analysis.	Professional evaluators are committed to evaluation – they may not be particularly committed to your project and your participants.
Their insights are judgements will be seen as independent by potential funders.	Their fees can be expensive unless you have budgeted for their services at an early stage of project planning.
They can act as critical friends to the project and help you to think through solutions to emerging problems.	Once their judgements and recommendations are made, they leave. They do not have any responsibility for following through on what they say.

Methods

1 Surveys and Questionnaires

Surveys and questionnaires are among the most common ways of collecting evidence. They can be filled in by those responding in their own time, or filled in during a question and answer session with the evaluator. They are useful for answering 'how' and 'what' questions, such as 'how many people are involved in this activity?' and 'what have you found most useful about this training?'

ADVANTAGES

- They are relatively easy to administer.

- Everyone is asked the same questions.

- They can be designed in ways that make analysis fairly simple.

DISADVANTAGES

- The design process can take a while. It's a good idea to try out the format on a few people first, to make sure it works.

- The response rate is often low – especially if the questionnaire is long.

- The format assumes that people understand the questions, have the necessary information and are prepared to divulge it.

- The questions you ask may not connect to what people want to tell you.

DESIGNING YOUR QUESTIONNAIRE

- Keep the questionnaire as short as possible. Only ask those questions that you really need to know about.

- Space out the questions – dense print is off putting and will affect the response rate.

- Use simple language, avoid jargon and spell out any acronyms.

- Give clear instructions about how to complete the questions.

- Order the questions so that straightforward questions come first and more sensitive questions come later.

- Try to order questions in a logical sequence.

- Insert a category for 'don't know' or 'not applicable' where relevant.

- It may be useful to have an 'other' category with a 'please specify'.

- Ask a sample of people who will be completing the questionnaire to try it out and give feedback on how it feels and what's missing (sometimes called 'piloting').

There are two kinds of questions, closed questions (which come with multiple choice answers that can be ticked according to which answer the respondent prefers) and open questions (which give more space for respondents to answer in their own words).

CLOSED QUESTIONS:

- limit and pre-determine the responses that can be given;

- take less time to answer;

- are easier to analyse;

- are best for collecting facts and figures.

Try to standardise the way you want respondents to answer your questions. Common response formats are:

- yes / no / don't know;

- very satisfactory / satisfactory / unsatisfactory;

- very good / good / fair / poor;

- agree strongly / agree slightly / neither agree nor disagree / disagree slightly, disagree strongly.

Keep the categories short, three or four are usually enough. Answers can be recorded by hand (if the numbers are small) or with the help of a simple computer programme.

Q Of the young people you are working with, how many are:

Living at home? .....

In foster care? .....

In residential care? .....

Q Are young people actively involved in planning and decision making in the project?

(please tick appropriate box)

☐ Yes
☐ No
☐ Don't know
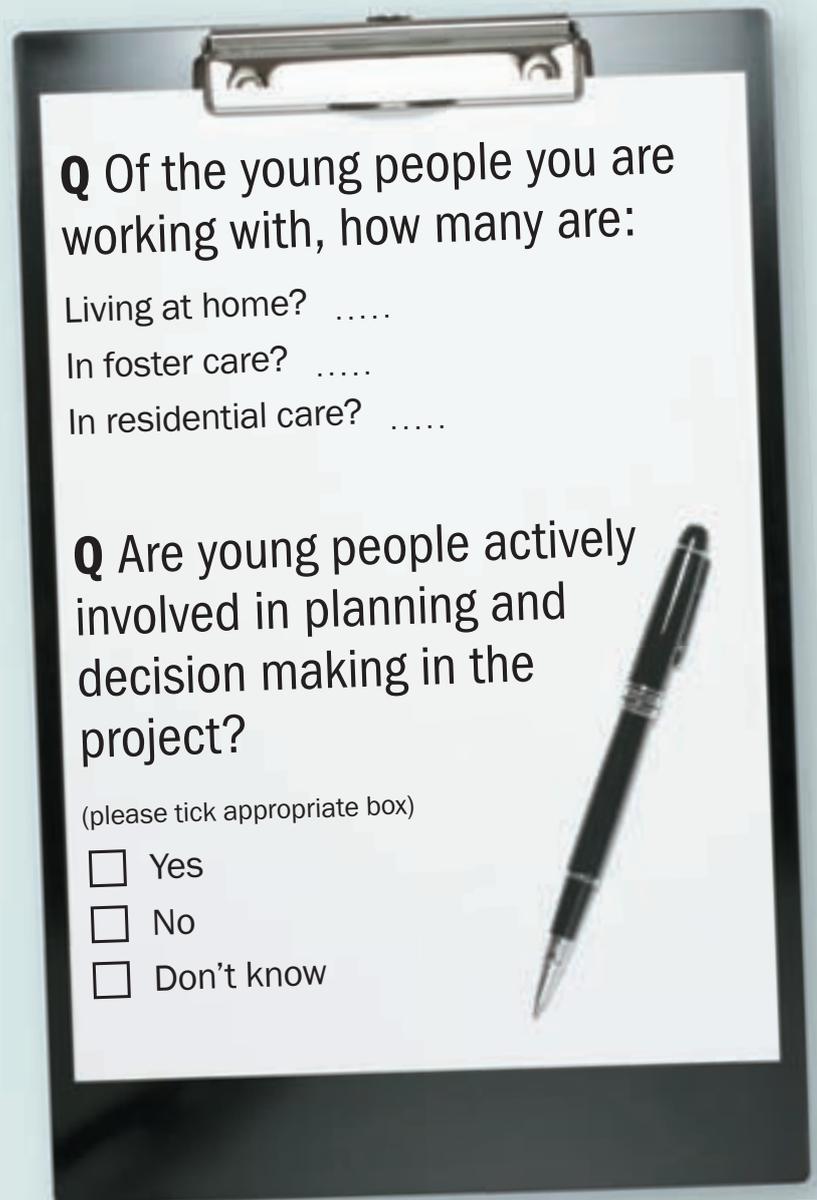
OPEN QUESTIONS:

- give respondents more freedom to say what they like;
- take longer to answer;
- take longer to analyse;
- are best used to gather opinions, experiences and feelings.

You must allow enough space on the questionnaire for comments. Answers are best analysed 'by hand', rather than computer.
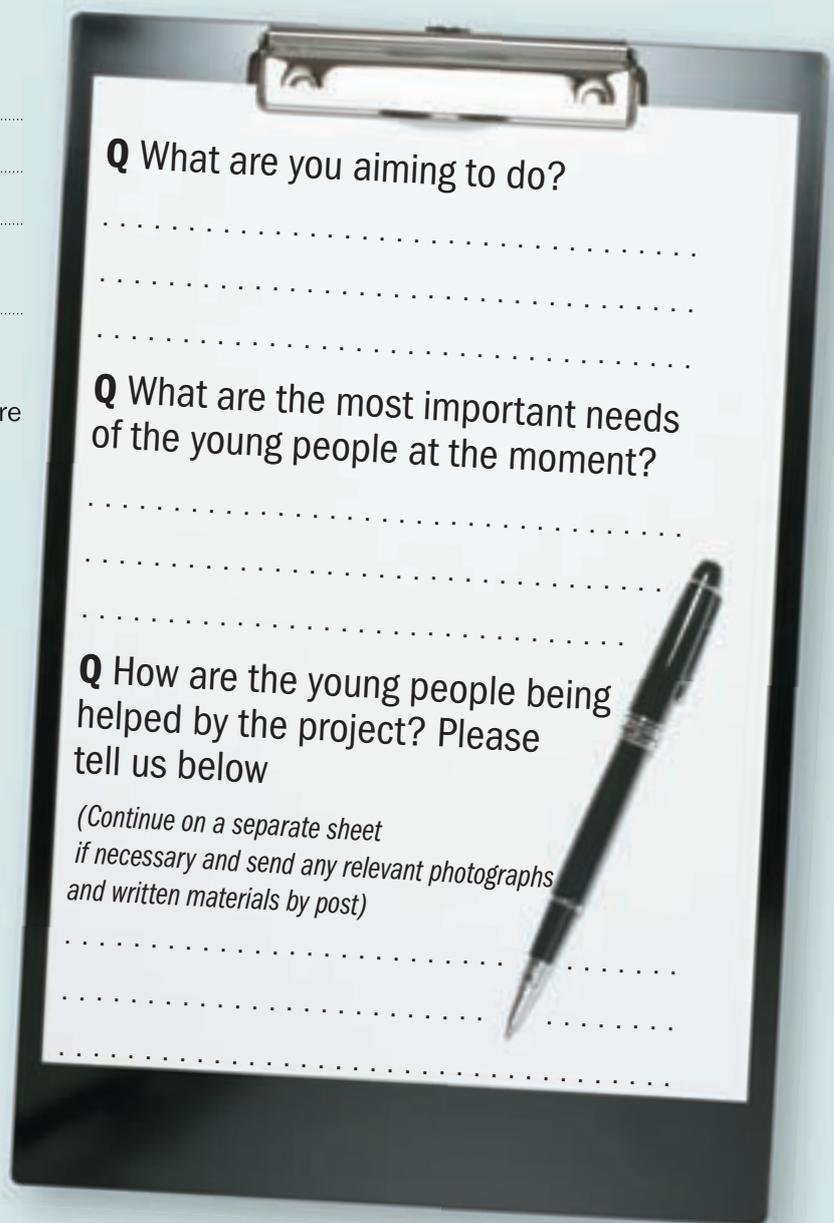
Q What are you aiming to do?

. . . .

. . . .

. . . .

Q What are the most important needs of the young people at the moment?

. . . .

. . . .

. . . .

Q How are the young people being helped by the project? Please tell us below

(Continue on a separate sheet if necessary and send any relevant photographs and written materials by post)

. . . .

. . . .

. . . .

A FEW THINGS TO CONSIDER:

- How will questionnaires be distributed?
- How will you persuade people to respond?
- What about anonymity and confidentiality?
- Who will own the information and how will it be used?
- How will you process the information and analyse it?

2 Face-to-Face Interviews

Interviews can be carried out with individuals or with a group. They are a good way of asking 'why' questions and of double-checking that you have really understood what people want to say.

ADVANTAGES

- They offer a two-way exchange between the interviewer and interviewee.
- They allow for more probing questions and more in-depth answers than questionnaires.
- They are more flexible than questionnaires.

LIMITATIONS

- They take time to carry out.
- They are likely to involve fewer people than a questionnaire.
- They require good interviewing skills (i.e. the ability to put someone at their ease and get them talking; to listen carefully rather than imposing your views; whilst keeping an accurate records of what is being said.)

WHAT PEOPLE DECIDE TO TELL YOU IS VERY DEPENDENT ON:

- their perception of you;
- their interpretation of your questions;
- how they wish to present themselves.

STEP 1

Decide who will conduct the interview and make sure that person is well-briefed. Provide training if necessary.

- Start by preparing a set of questions you want to ask.
- Put the questions into a logical sequence.
- Keep them simple and open- ended.
- Avoid leading questions.

STEP 2

- Find a quiet and comfortable space where you won't be disturbed and can be private.
- Explain what the interview is about and why you are doing it.
- Discuss confidentiality and anonymity.
- Decide how you are going to record the interviewees' replies. Taking notes whilst the person is speaking can be distracting. Making notes afterwards can distort what they said. Making a tape-recording needs their permission.

STEP 3
- Keep a written record of each interview and if possible check back with those being interviewed that you have reflected their comments accurately.

- Compare the responses you have been given by all those you have interviewed. What are the common threads? Disagreements? Interesting insights?

- Keep an accurate record of relevant and telling quotes, which you can then use as evidence to illustrate your evaluation report.

At the back of your pack you will find the questions used by Greenwich and Lewisham Young People's Theatre project HeadstArt to interview young people about the project. (See back pocket, sheet 5).

Of course some young people find more formal approaches like interviews difficult. When thinking about particular sessions and activities HeadstArt gets round the problem by using flash cards to help them order what they did – according to what they liked most and what they liked least. Participants are also asked what else they would have liked to do and what could be done in the future. (See back pocket, sheet 6).

3 Telephone Interviews

The success of telephone interviews depends on people having access to a telephone, the knowledge and confidence to use it and the necessary communication skills.

Telephone interviews are said to be more cost-effective than face-to-face interviews. Experience shows they can generate lots of information because people feel more secure when they are in their own environment. It's usually easier to be critical when you are not in the same room as the interviewer!

However, it's hard to read the body language of someone at the other end of a phone. It can be harder to establish a good rapport, unless you already know the person well. And answers tend to be shorter and less rich than in face-to-face interviews.

4 Focus Groups

Focus groups (of 8-10 people) or smaller, buzz sessions (maximum 6 people) can help you canvass several people's views about your project. Choose a comfortable place to meet that is easily accessible. This will encourage people to come. You will need some carefully prepared questions for group members to think about and group facilitators (ideally two) who can:

- make sure everybody has a chance to have their say;
- tactfully prevent anyone dominating the group;
- make sure all issues are covered;
- bring people back to the point when necessary.

Good listeners are ideal people to lead focus groups but some training in the skills and techniques is essential. If you have good people skills, group members are likely to feel more comfortable with you and more able to express honest opinions. Collecting these can be quite difficult and it is crucial to note down exactly what is said. You might find it easier to tape record the discussion so that you can concentrate fully on asking questions and listening. The facilitator and the group members should share a common language. Everyone taking part must consent to the recording and you must guarantee confidentiality. Your record of the discussion should then be turned into a short report that gives details of the main findings, together with relevant quotes.

5 Users' Forums

Users' Forums are a way of involving users and project participants in regular discussions about their experiences. They can also be used to generate ideas and to produce recommendations about future provision. The same approach can be used in neighbourhoods to discuss local issues. They help project participants and residents contribute their experiences and views to wider discussions with professionals, providers and decision- makers.

Forums offer a method of consultation that goes far beyond asking people whether or not they are satisfied with the service being provided. They encourage a more open dialogue about broader issues. The membership of a forum can be restricted (to project representatives) or open to everyone. The administration of the forum can be given over to the group to run themselves, or arranged by a volunteer or paid worker.

SETTING UP A FORUM

When setting up a forum there are four main points to keep in mind:

- **the purpose;**
- **the membership;**
- **the ownership;**
- **the recording and feedback mechanisms.**

PURPOSE

Be clear about what the forum is for and what its setting out to do. Members of the forum will come with a passion to contribute and with a desire to give something back. They will feel disappointed if the purpose is vague or if the group seems 'tokenistic'. The purpose needs to be reviewed regularly and redefined if necessary.

MEMBERSHIP

Ensuring a good cross section of users and project participants, who are prepared to attend regularly, can be difficult but forum members themselves are the best people to recruit those who are under-represented. It is very important to welcome, encourage and support new members in the early stages and to be clear about how much time and effort is involved – most people's lives are pretty complicated.

OWNERSHIP

Establishing a feeling of 'ownership' of the forum by its members is important. People can be put off joining because of money or language difficulties. Ideally, child-care, travel and other out-of-pocket expenses should be covered so that no-one is excluded for reasons of cost. And all expenses should be met quickly, efficiently and in advance if possible.. Some kind of bi-lingual buddying scheme will be essential to help with translation. Trying to operate without interpreters and some funding to cover expenses will mean that important voices are excluded.

FEEDBACK

If the forum is to have influence and significance, it needs to have ways of giving feedback about its work. This could be through meetings with other project members, a newsletter, emails or a web site. Forum members might be asked to act as representatives on committees and planning groups related to the project. If there are other users' forums in the area or the organisation, it would be good to have the occasional get-together to compare notes and learn from each other's experiences.

OTHER GOLDEN RULES

- **Training to support forum members is essential and should be relevant to the task, for example, doing radio interviews, chairing meetings, and making presentations.**
- **Provide a pleasant and comfortable space to meet, with refreshments. If people are giving their time and energy to the forum, they deserve proper recognition.**

6 Listening Campaigns

The main purpose of a listening campaign is to find out what people feel strongly about, in the belief that they are more likely to talk about what is bothering them outside of formal meetings. It involves listening very attentively to what people are saying as you all go about your everyday business.

- Listening campaigns can be used to solve problems or to identify issues in workplaces and voluntary organisations as well as in neighbourhoods.

- They rely on a participatory approach – between 6 and 10 people is a good working number - but it depends on the scale of the campaign. 6 to 10 listeners might be enough to hear what is being said in a small voluntary organisation or community centre. You will need more if you want to organise a listening campaign in a fair-sized neighbourhood or large community organisation. A mix of listeners (such as paid workers, volunteers and project participants) - who have contact with different members of the community - is best.

- Depending on the scale of the exercise, allow 6–10 weeks for the campaign to be carried out, with weekly meetings for those involved.

STEP 1

Start by calling a public meeting to let people know about the campaign, its purpose and when you will report back with your findings. Provide simple guidelines for listeners.

STEP 2

The group goes out listening.

- You don't need to ask anyone any questions.

- Simply go about your normal routine with alert ears and eyes.

- Try not to get involved in discussions but concentrate on listening to what others are saying with feeling and emotion.

- Keep a diary to jot down the main things you have heard each day.

The campaign is not spying or eavesdropping – it's about listening more attentively to what people are talking about with obvious feeling. You don't record any names, just the issues and the emotions they excite, for example, feeling excited about the chance to learn video skills; feeling hopeless about bullying and racism in the area; feeling concerned that the police are too intrusive/not around when you need them; feeling worried about what will happen when the advice centre closes down.

STEP 3

It's a good idea for the group of listeners to meet once a week to report back on what they have heard.

- Discuss questions of confidentiality thoroughly.
- You might need to get some practice in listening skills.
- Help each other think through what those you are listening to feel strongly about.
- Learn to put your own opinions on one side for the time being and concentrate on what you are hearing.

As the weekly meetings continue, your group should work together to keep a joint record of what you are hearing, gradually focusing your attention on what seem to be the key issues.

STEP 4

Call another public meeting to report back on what has been discovered. The findings can also be:

- written up and used as part of an evaluation exercise;
- presented as evidence to relevant organisations;
- used as the basis for developing relevant forms of provision and making changes if necessary.

WHAT HAPPENS NEXT?

The next stage is to draw together new and different groups of people to plan and carry out the recommended action.

7 Doing a SWOT Analysis

A SWOT analysis is a good way to get from 'where you are now' in the project or organisation, to 'where you would like to be'. It helps you to think about what **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats are involved in an issue or event you want to discuss.

For example, the issue might be: Can we organise an event for local people at which our project participants showcase some of the work they have been involved in by next March?

Doing a SWOT analysis would involve the following steps.

- Attach four sheets of flip chart paper to the wall marked:
  Strengths of the project
  Weaknesses of the project
  Opportunities available from outside
  Threats coming from outside.

- Brainstorm the external opportunities and threats involved in getting the event organised. Record views on the flip chart. Be as specific as possible.

- Discuss and record on the flip chart any relevant strengths and weaknesses within the project, making sure these are understood properly.

- Discuss the responses to the external opportunities and threats you've identified, focusing on what internal strengths and activities you could deploy to enhance the opportunities and reduce the threats.

- Create an action plan with names and dates against each task showing who will do what by when.

8 Appreciative Inquiry

The simple, but radical, ingredient in Appreciative Inquiry is that instead of thinking about problems and dysfunctions, the starting point is the positive and the building of dreams based on everyone's experience and imagination of what works well. One of the underlying assumptions in Appreciative Inquiry is that in every organisation something works. The process uses questioning to reveal positive and shared experience which everyone can use (Annette Zera and Susan Murray, *Getting On Brilliantly*).

The Appreciative Inquiry method was created by Dr David L Cooperrider. It is based on the simple idea that you should search for the best in people, in your organisation and in the world around you. It encourages day- dreaming, positive thinking and stretching the imagination as a more creative response to problem solving than bureaucracy or complaining. It can be used in both small and large groups and is very democratic.

So, for example, you might want to improve your **outreach** or training methods. Paid workers and volunteers with outreach/training experience would be asked to describe their most memorable experience of an outreach approach or training session that worked really well. Participants benefiting from an outreach approach or training would explain how it got them involved, what they liked about it. Positive stories like these are then followed by a series of questions.

STEP 1: DECIDE WHAT ISSUES YOU WANT TO EXPLORE

Let us suppose you want to improve your outreach practices, and particularly your approaches to young people. At an Appreciative Inquiry meeting called to put some changes into action, paid workers, project partners and project participants could be invited to describe their most successful experience of contacting and working with young people, in ways that have had a real impact and led to excellent learning opportunities. They could be asked to describe an incident when they, or someone they know, pulled out all the stops to make something happen, or to make it significantly better.

STEP 2: FRAMING QUESTIONS

These positive stories can then be broken down through a series of questions that help people to think about them in more detail and to identify the ingredients of success. Frame questions that are short, simple and open. For example:

- **What made that possible?**
- **What was it about you that made it happen?**
- **Who else was involved and what did they do to make it such a success?**
- **What ideas do you have to make our outreach practices exceptionally good?**
- **What ideas do you have to make things easier for us all to build on this kind of approach in the future?**

People can then work together to design a better approach based on the answers and the themes of the stories.

STEP 3: FROM APPRECIATION TO ACTION

Appreciative Inquiry is often described as a 4D cycle that starts with appreciating what is good in existing practice, dreaming about what else might be possible, turning those dreams into actual objectives and making them happen.

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                        ┌─────────────────┐
                        │   DISCOVERY     │
                        │  The best of what│
                        │  already happens │
                        └─────────────────┘

   ┌─────────────────┐                    ┌─────────────────┐
   │    DESTINY      │                    │   DISCOVERY     │
   │  How to make    │                    │  What else might │
   │   it happen     │                    │   be possible   │
   └─────────────────┘                    └─────────────────┘

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                        │   DISCOVERY     │
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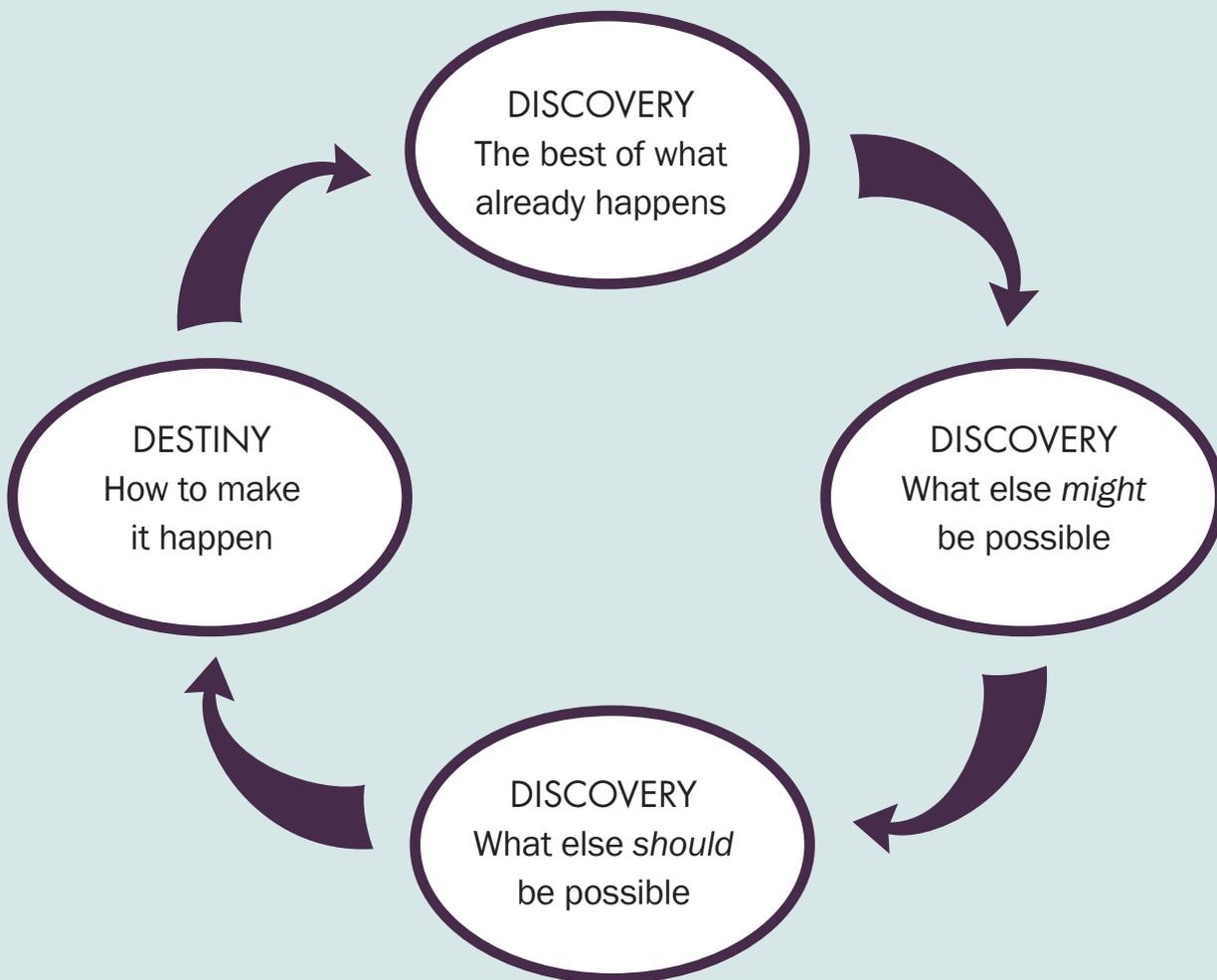
STEP 4: DESTINY

Produce a short report (see page XXX) that details the improvement you want to make based on the 4D Cycle discussions.

- Send the report by email, or as a paper copy, to all those who took part in the Inquiry as soon as possible after the end of the meeting.

- Circulate the findings and recommendations more widely through project newsletters and press releases – especially if you want to announce some new developments.

- Make sure you report on the findings of the Inquiry at all decision-making meetings relevant to the project.

- Use the findings from the Inquiry to feed into the planning processes of the project, the organisation and the partnership.

For more on Appreciative Inquiry see **http://appreciativeinquiry.cwru.edu**

9 Open Space

Open Space is a very effective and enjoyable way of organising large meetings or workshops. It gives maximum participation, self-management, energy and focus. The approach was developed by Harrison Owen when he realised that the most creative and enjoyable part of most conferences and meetings is what goes on in the coffee breaks. So he designed the process to excite the same levels of energy, interest and involvement.

Open Space can be used for huge, large or small meetings. Whatever the number of participants or time available, an Open Space meeting allows everyone to work on the issues that matter to them, for which they have some passion and for which they might want to take some responsibility in the future. It enables project workers and project participants, trustees and partners, volunteers and administrators, amateurs and experts to all work together.

An Open Space meeting must have a clear theme and focus that will make people want to attend. Although distinguished experts may be present, there are no platform speeches or presentations.

The meeting starts with all participants sitting in a circle, or concentric circles if space is limited. The sponsoring organisation introduces the theme of the meeting and the facilitator then walks around the circle and explains how the meeting will work.

You need:

- A room large enough to accommodate the circle of people taking part with break-out rooms if possible.

- An experienced facilitator.

- Two walls where you can stick up the agenda of workshops for the day and also the recommendations that come out of the discussions.

- Plenty of pens, paper and strips of colourful sticky dots.

- A typist, a printer and a photo-copier to keep a record of group discussions as their recommendations start coming in.

- You might want to set up a Graffiti wall (see page XXX) on a third wall for people to record comments that don't get covered in the discussion groups.

STEP 1

Let us suppose the theme of the meeting you have in mind is:

How can we make this working partnership really successful and what can each of us do to help?

- Participants are asked by the facilitator to think about a topic that relates to the main theme which they would like to work on with others in smaller groups.

- The facilitator describes the 'law of two feet' that encourages people to move groups if they find they are in one to which they cannot contribute.

- People are then invited to come to the centre of the circle and write down their topic on a piece of paper, read it out, and post it on the 'agenda wall' to create the programme of workshops for the day. The facilitator encourages all members of the group to suggest topics not just the most experienced or powerful people present.

- By the end of the first hour the agenda wall is covered with workshop topics arranged at clear times, in identified breakout rooms or spaces throughout the day.

STEP 2

- People sign up for the workshops they are interested in.

- These are led by those who identified the topics in the first place.

- A second group member volunteers to keep a note of the discussion and to record the group's main recommendations.

- At the end of each workshop the (short) notes of the discussion are typed up and the recommendations from each group are posted on the 'recommendations wall' for all to see.

STEP 3

- Give everyone chance to read the recommendations wall.

- Give everyone a strip of 10 sticky dots and ask them to stick a dot against the 10 recommendations on the wall which they think are most important. This gives you a good sense of the group's main priorities.

STEP 4

- After all the workshop discussions have taken place and the sticky dots have been attached to the most favoured recommendations, people return to the circle to comment on their experience of the meeting.

- It is common for people to say that they had been a bit sceptical when they arrived (because there was no initial agenda or someone telling them what to think) but found it useful and enjoyed it hugely.

STEP 5

- The record of discussions and group priorities should be sent by email, or as a paper copy, to all those who took in the Open Space meeting as soon as possible after the end of the meeting.

- Circulate the findings and priorities more widely through project newsletters and press releases – especially if you want to announce some new developments.

- Make sure you report on the findings of the Open Space meeting at all decision-making meetings relevant to the project.

- Use the findings from the Open Space meeting to feed into the planning processes of the project, the organisation and the partnership.

- It is really important that people are kept informed about how the recommendations are being followed up.

For more about Open Space see **www.gettingonbrilliantly.co.uk** and **www.openspaceuk.com**

10 Conducting a Participatory Review

Conducting a Participatory Review of your project, part way through its life, is a good way of reflecting on how everything is working, gathering information from many sources, and involving the right people. It contributes to formative evaluation which encourages you to take stock of things as you go along. Formative approaches can help to address difficulties as they occur, in order to make changes, as well as encourage reflection and shared understandings of how things are developing.

A Participatory Review is a democratic approach to evaluation that involves as many interested people as possible, in ways that can influence future decisions and inform change. It can be used, for example, to review the development of new training programmes, the strengths and weaknesses of partnership working, or to gather evidence from stakeholders about emerging impact and outcomes. It can be used to show what has been achieved so far, how this has happened and whether or not this is making a difference to people's lives. The activity of the Review provides a creative space for new and unexpected ideas and conclusions to emerge and feed into further work.

SETTING UP THE REVIEW

A Participatory Review is a way of empowering all those who are directly involved in the project to think and act more proactively about their own development and about the impact of the project in a wider context.

STEP 1 – INVOLVING THE RIGHT PEOPLE

The first task is to put together a small review team. It should include a mix of project participants, paid workers and partners as well as someone from the appropriate management team and Board of Trustees. It's a good idea to include a 'critical friend' – someone not directly involved (and who is therefore independent) – who knows and sympathises with what you are trying to achieve. The critical friend is there to help you spot potential difficulties or conflicts, to encourage you to face them, and to help you work through solutions and changes.

STEP 2 – PLANNING YOUR REVIEW STRATEGY

Once your team is in place, its first task is to plan the review strategy and to identify as many other people as possible who can supply evidence and information. The following guidelines will help.

- Agree which broad issues or themes you want your review to cover. But remember, a major benefit of a Participatory Review is that it will also uncover new and unexpected issues and questions.

- Think through what sources of information might tell you what you need to know – what evidence will you need? This could be either quantifiable (numbers, facts and figures) or qualitative (feelings, experiences, happenings).

Quantifiable evidence might include for example:

- the number of outreach activities or taster sessions organised in the local community;
- the number of feedback and consultation activities organised (what were they about? what methods were used?);
- the number of new participants signed up for courses and activities;
- the number of participants involved in different activities e. g. training sessions, focus groups, users' forums, open space meetings etc.;
- the number of completed surveys/questionnaires/doorstep interviews;
- the number of networking activities, e. g. visits, meetings, support sessions.

Qualitative evidence might include for example:

- eye witness accounts;
- participants' testimonies (verbal and written);
- training materials;
- videos, displays and performances;
- press and media coverage;
- comments by local people, organisations and employers;
- statements by partner organisations.

This material will help you to understand:

- the ways in which the activities and methods used have been successful/not so successful;
- the ways in which the outreach methods used are worth repeating elsewhere;
- what the impact has been on participants, organisations, partners, employers and communities;
- the lessons that can be incorporated into future approaches;
- the extent to which the original aims, objectives and outcomes are being met;
- what should happen next.

Think about who can give you the information you want, and how and when they should be approached. Remember, you need to give people clear guidance about what's wanted, plenty of time to gather the information and be ready to answer their questions.

STEP 3 – CONDUCTING THE REVIEW

Set aside three days to receive the information from a mix of participants, workers, partners, other stakeholders and managers. Use the methods suggested in other parts of this resource pack - such as Appreciative Inquiry, focus groups, story boards, Graffiti walls, video diaries and face-to-face interviews - to stimulate discussion around the information and evidence being supplied.

Build in time during the three days to meet as a team to keep a record of what you are learning. Ask your 'critical friend' to comment on any problems or difficulties and to help you start drawing conclusions and recommendations. Think about what's working well, what needs more attention, the problems, and any recommendations for change.

Set aside twenty-four hours to produce a report.

Your report does not need to be long or complex - especially if you want everyone to read it. It needs to be put together quickly and to give details about the Review, its findings and its recommendations (see page XXX).

STEP 4 – SPREADING THE WORD

It is important to feed your conclusions back to everyone who has taken part in the Review and who is affected by its conclusions. It is also really important to keep people informed about how you intend to follow up on the recommendations.

- Send the report by email, or as a paper copy, to all those who took part as soon as possible after the end of the Review.

- Circulate the findings and recommendations more widely through project newsletters and press releases – especially if you have good things to celebrate.

- Make sure you report on the findings of the Review at all local meetings relevant to the project.

- Use the findings to feed into the planning processes of the project, the organisation and the partnership.

11 Graffiti Walls

A graffiti wall is a flip chart or a piece of wallpaper stuck to the wall and one or two marker pens. Its purpose is to give people chance to express themselves in different ways - to draw or to write things in whatever way they like. It's important that what gets written on the graffiti wall is taken seriously and can be used as evidence during evaluation sessions.

YOU WILL NEED:
- Flipchart or wallpaper
- Marker pens

12 Storyboards

STEP 1: Agree the question or issue to be discussed – for example:

Has the project helped you to feel more confident?

STEP 2: Ask the group to break the question/issue down into different areas they think are important. Write each of these at the top of a sheet of flip chart paper. The areas might include, for example:

When you are at school/college
....

When you are in the neighbourhood
....

When you are mixing with different people
....

When you are using new skills
....

When you are looking for a job
....

YOU WILL NEED:
- Flipchart
- Marker pens
- Post-it notes

STEP 3: Ask the group to divide up and stand in front of one part of the storyboard. They can use the pens and post-it notes to write or draw their responses to the question under the headings they have chosen.

STEP 4: After a few minutes, or when everyone has had their say, they move on to the next flipchart.

STEP 5: When everyone has responded to all the different areas, group the replies and comments together and summarise the response.

13 Story-telling and Testimonies

Short anecdotes, stories and personal testimonies can give a vivid sense of what it is like to be part of a project in action. They can illustrate what a project is doing but also what the story-teller feels about the experience.

They provide the opportunity for less confident or less powerful voices to be heard and to develop their language and communication skills. When the anecdotes and stories are told by paid workers, trustees or partners – who are likely to be more confident and vociferous – they help to liberate the teller from more routine and jargon-laden accounts of their practice.

The best anecdotes, stories and testimonies are brief but vivid. They should be about specific elements of the project and try to give a sense of 'being there'. They are useful in either small group or one-to-one sessions and are an excellent way of getting people directly involved in an Appreciative Inquiry (see pageXXX).

When written up the stories and testimonies are often anonymous.

14 Logbooks, Blogs and Webchats

Logbooks (diaries) and Blogs (web-based diaries) can be
created by both paid staff and participants to keep a personal record of what they are doing, learning, and feeling, in relation to the project.

They can be used over a short period – such as every day for a week – to keep a record of time-bound activities such as residentials. Or once a week for an agreed period of time, to record the writers' developing experience of the project.

Getting started on their diary may be initially daunting for some participants. The Womens' Counselling and Therapy Service in Sheffield, for example, gets round this problem by providing a simple framework for recording each entry (see back pocket, sheet 7). You could create your own version in much the same way.

The best logbooks and blogs are also reflective about what is happening, rather than simply descriptive. Project participants could be encouraged to combine their logs with a scrapbook that includes drawings, photographs and flyers from specific activities and visits.

Blogs are popular with those who like using the web and they can become very addictive. Once placed on the web, the blogs become public property very quickly and can be easily read by others who are interested in what they have to say.

The act of writing a weekly diary into a notebook might feel more confidential. Writers would need to give their permission for extracts and copies to be made more widely available as qualitative evidence in the evaluation process.

Computers can also be used to support webchats between participants. Given the various risks associated with internet chatrooms, you will need to think carefully about monitoring and access issues. If the security and the surveillance becomes too intrusive, many people lose interest. If the risks can be minimised, webchats are often very popular with those who enjoy – or are learning to use – the internet.

15 Photo-Diaries and Scrap Books

Not everyone communicates best using the written word – especially in a language that is not their mother tongue. Scrapbooks are a fun way of keeping a record - especially for young people - and do not rely on lots of writing. A collection of memorabilia associated with the project, stuck into a scrap book, with drawings and short bursts of written commentary and headings, can create a work of art in itself as well as a personal record of what individuals have done, learned and experienced during the project.

Photo diaries can also capture the imagination and involvement of those who like taking photographs. They can be used to tell stories, record activities, demonstrate learning and express feelings. A bit of guidance about photographs 'that tell a story' and some particularly good examples of those that do, used as the stimulus for group discussions, could well get people thinking creatively about using photographs to tell their own stories.

The increased and relatively cheap availability of throwaway and digital cameras now makes this method of recording experience a real option for most projects.

An alternative approach, that builds on the solidarity of young people working together, rather than acting separately, is to create shared scrapbooks in the form of murals and exhibitions. This is a method used to great effect with young people by Media 19.

THE LIVING ROOM

The Living Room is an interactive website aimed at young people aged between 14-19 living in Manchester. This is a new and innovative concept and is a valuable participation tool. It has a fun, informal area where young people can chat about lots of different topics, including education, fashion and current issues. They can also log onto the regular webchats, where decision makers from across the city can consult with young people to get their views on issues affecting them. It's vital that the young people get their voices heard and young refugees and asylum seekers can put their views across in a safe and encouraging way whilst interacting with others.

Manchester Youth Volunteering Project

In our project, young people are using photography and digital imaging, alongside more traditional media, to express and explore their feelings about identity, what they want to say about their lives and what they are doing now.

To encourage participation, we show them how to use photography and digital imaging -including Photoshop, simple photomontage and layering of images - to tell their stories. The images do not have to include their face. They can work together to take their photographs using their bodies, hands and eyes to create shapes, patterns and statements that reflect their feelings about who they are and what they have been doing. Young people often find it easier to express their ideas by taking photographs of a personal or found object such as an item of clothing, a letter, a bus ticket; or by taking images of the people they are with or the places and surroundings they are in. These can be accompanied by a short personal statement or a piece of creative writing or poetry which can also be included as part of their image and can be in their own language.

Many young people today have access to mobile phone technology, digital imaging or disposable cameras. These can be used to create short narratives and photo diaries, telling a story through a series of still images. Giving them a series of questions to consider, such as, How do I feel today? What am I learning? Who do I see?, can help them to document their day from the familiar routine of mealtimes and catching a bus, to their feelings about where they are now, their friends and the unexpected and often irregular events that shape their lives. Taken over a period of time, these images can be collected and organised by the young people themselves to create their own photo diaries or self-portraits. This is a valuable resource which highlights how being part of a project can affect and influence their experiences.

Media 19

16 Video and Audio Diaries

Reality television has helped to popularise the idea of video diaries. For some the technology will get in the way of being able to express themselves unselfconsciously. But for those who like video technology, or who want to learn more about using it, making a video diary about their experiences of the project could be a popular place to start. Audio diaries provide another variation linked to personal testimonies and radio.

As with logbooks, blogs and photo diaries, the activities are almost an end in themselves, as aids to creativity and better communication. But for the purposes of evaluation, you should encourage the diarists to reflect on their experiences and give meaning to them, rather than simply describe or show them.

Commentary and images produced in creative ways add considerable interest to some otherwise formulaic evaluation methods and can become the talking points which enable potential funders and policy makers to better understand the context and purpose of your work.

17 Feeling Boxes

Feeling boxes can be used to help people of all ages talk with each other about themselves, their emotions and what they think about the world they find themselves in. It's a method which is used to great effect with young people at the City Academy in Bristol. Inevitably the discussion leads to personal and often traumatic stories. Paid staff need to be hugely sensitive and respectful to what is being revealed.

YOUNG BRISTOL

First of all we discuss memories and legacies and time capsules. We visit the museum to look at what different artefacts tell us about people and places and cultures. We explore our different identities, the different cultures we move across, and the experiences we have that make us who we are.

Then we make our boxes. I made one as an example that reveals my heritage of growing up in Margate, in a Jamaican Vietnamese culture.
I brought in tapes, pictures and bits and bobs valuable to me. We discussed what these things say about me.

Then the group begin to decorate their own boxes and started filling them up with their bits. These included photographs, poems, newspaper reports, maps of countries, postcards, fragments of jewellery, articles of cloth and clothes, food wrappers.

Some young people asked how they could put their tears in their box and the years spent in hiding, or pain. Of course, this is difficult to handle and I would not presume to advise, as we all have to work out a way for ourselves. I listen and listen and feel very humble that the young people trust us enough to be able to talk in the way they do. We do have some trained counsellors to help us.

You have to make a judgement about whether the experience might be too painful. Sometimes make a group box that reflects us a group, working together in Bristol with Young Bristol. Into the group box we have put found poems, bits of writing about the activities we do ,brochures, photographs etc. The decoration around the box is just amazing. This kind of group work promotes discussion, negotiation and give and take.

Young Bristol and City Academy, Bristol.

18 Performances and Presentations

Performances and presentations by project participants to their peers, their community, the Board of Trustees, at a Participatory Review (see page XXX), for example, builds on the skills (of self-expression, language development, communication, self confidence, team work) and activities (creative writing, drama, music, radio, artwork etc) being developed in projects. They provide the opportunity and the occasion for participants to showcase what they can do and to give the audience a vivid sense of the project in action.

In circumstances of external evaluation or a conference, it is a really good to include some form of presentation or performance by participants. It gives participants more personal choice and control over how they say what they want to say. And it enables the evaluation team or conference audience to acquire a better understanding of who is benefiting from the work you are doing.

Working with project participants to develop a performance or presentation, for a specific and important event or purpose, is a learning experience and team building exercise in its own right.

4 MAKING A DIFFERENCE

Contents at a Glance

One of the main aims of evaluation is to measure the impact of a project. You need to be able to show, with supporting evidence, in what ways, and for whom, the project has made a difference. There are many different approaches and methods you can use to solicit this information, providing both quantitative and qualitative data *(see Chapter Four).*

What contributes to making a difference can take various forms.

- **At an individual level, it might be that participants have learned new skills, increased their self-confidence, enrolled on a course, found a job.**

- **At a community level your project might have supported specific groups of people whose needs are otherwise overlooked. It might have provided the delivery of mainstream services at a local level in a more relevant and culturally-specific way. It might have contributed to improving local race relations and social cohesion.**

- **At a national level, your project might have demonstrated good practice and impact in ways that others can adopt elsewhere; or helped to influence the views of those who devise policies and provide funding to the voluntary sector.**

Despite the current fixation with targets, we know that the 'numbers game' is not everything. Simply recording the fact that 120 people have taken part in your project is relatively meaningless. In isolation it tells you nothing about what the participants have learned, what the quality of the experience was like, whether the experience was relevant and useful, what they intend to do as a result, what you have learned from the experience or how you would do things differently in the future.

The data you collect should help you to answer some of these questions, especially if you regard evaluation as an ongoing process, rather than a one-off exercise.

RECOGNISE

Recognise is a programme of Youth Arts activities taking place in three deprived areas of Bradford - inner city Manningham with its very mixed community, drugs and crime issues, semi-rural estates in Keighley, and the predominantly white working class area of Holmewood.

By working with groups in their own areas it has been possible to gain their trust and respect, in turn encouraging them to develop confidence to work together on projects with young people from other, very different, areas. When the young people agreed to perform in front of their peers at the Urban Flavaz event in Bradford's Alhambra Studio and Bradford Mela, the performances were hugely successful.

Artforms have included drama, digital art, street dance, aerosol art and rap. Young people have worked with local, highly skilled, professional artists who have offered support and guidance, enabling young people to discuss and explore issues that are important to them. Some members of groups have been actively encouraged to take on leadership roles, gaining valuable work experience by acting as support artists and helping to deliver workshops.

...no more junkies queuing up for their crack,
getting really high off the damn dirty smack.
BNP think they rule us but they don't have a clue,
that us Keighley people don't want nothing to do with you!

(DJ Jess from 'If I ruled Keighley...' rap project)

When our tutor came along it was the first chance I'd had to work with a real choreographer. She taught me loads of techniques and tips, but made it really enjoyable at the same time. Now I feel confident about teaching the other girls, and although it's been a bit scary performing, we've had great feedback!

Cleo, (street dance project)

PROJECT OUTCOMES
- Enabled creative exploration of sensitive personal and social issues, including drugs, homelessness, racism, and crime;
- Gave young people the opportunity to work with skilled professional artists in an informal and fun way;
- Developed high status technical skills, as well as interpersonal skills;
- Increased understanding between young people from diverse communities and cultures, who would otherwise not mix;
- Gave some young people valuable experience of helping to deliver projects.

(Artworks)

Gathering the Evidence

Try to build up as full a picture as possible by gathering different kinds of evidence. For example:

WRITTEN AND SPOKEN EVIDENCE

- Check out with participants how they are feeling and what they are learning at regular intervals throughout the project - keep a detailed record or recording of what they say.

- Ask them to write a few things down (anonymously if necessary) which they think you ought to know – including suggestions for changes or improvements.

- Encourage them to do the talking when it comes to making presentations or attending meetings with officials and funders so that a real sense of joint endeavour is obvious.

- Include the words and voices of participants in all communications with the press and in all reports to funders or other agencies.

- Ask partners and providers to give you written feed-back from time-to- time, detailing their perceptions of any strengths and weaknesses.

VISUAL EVIDENCE

- Keep a photographic record of activities and achievements. Photos are good because they can show people doing things and relating to each other, as well as providing a record of events and special occasions. Make sure the photos are on display to reinforce group solidarity and a sense of belonging.

- The use of video and DVD cameras to record activities not only helps develop technical and creative skills, the results can be useful for campaigning and public meetings.

- If words get in the way, ask participants to paint their feelings on large sheets of paper at various stages of the project. It can be fun and is a way of also getting them talking about what they have painted.

INDIVIDUAL AND SOCIAL IMPACT

- Gather evidence to show the impact of your work on individuals and what is being achieved more generally in the community.

- Include personal testimonies about greater confidence and self esteem, evidence of learning new skills, making a contribution to sustaining a support group, or involving others in community activities.

- Include (anonymous) individual 'case studies' which follow through the experience of one or two individuals and the impact of the project on them.

- Include evidence of solutions being found to locally defined problems or the development of sustainable activities that did not previously exist.

Qualitative Indicators

Most people like producing qualitative evidence better than quantative data, especially when they use some of the more creative methods outlined in Chapter Four. As a general rule, however, collecting qualitative data should be used in conjunction with other methods because it can be very subjective.

Hearing one person's opinion or story may be very compelling, but it is a good idea to get a range of opinions and stories – ideally from different perspectives – to see whether the same sequence of events, or the same impact, is being described more generally. If you can do this by also using two or three different methods, to reveal the same trends and implications, so much the better.

Identifying appropriate indicators to reflect different people's experience of the project is difficult. Working out how to measure them is full of pitfalls. The conclusions you arrive at have to be credible and subject to scrutiny. A different evaluation team, looking at your project, using the same or different methods, should in the end arrive at the same conclusions.

Part of the difficulty lies in the fact that many, but not all, of the outcomes of community-development projects could be described as soft outcomes rather than hard outcomes (see pageXXX). For example:

reducing social isolation;

increasing social cohesion;

promoting active citizenship;

increasing social well-being;

promoting healthy living;

raising self esteem;

increasing self confidence;

Some outcomes are easier than others to measure. In those projects in which educational achievement is a desired outcome, you can combine quantitative data (qualifications achieved) with qualitative data (such as personal progression, changed aspirations,). Similarly, if getting jobs is seen as relevant to the project, it is simple enough to combine the numbers of people finding work with more qualitative insight into whether the nature of the work is what they hoped for and what impact it is having on their lives.

Measuring the reduction in social isolation or an increase in self esteem is more complicated, however. To start with, you need a common understanding of what is meant by social isolation and self esteem. It's a good idea to spell these out at the beginning of the project, on the basis of widely recognised definitions, and agreed understandings within the project team.

AGREEING ON DEFINITIONS

Problems can arise when the people/partners in project teams assume they are talking about the same thing, but actually have rather different, or woolly understandings, which are never properly clarified. For example, almost all projects claim to 'increase confidence' or 'raise self esteem'.
But what do these concepts actually mean?

⋯⃗ **Begin by acknowledging that everyone might have a slightly different 'take' on the term being defined.**

⋯⃗ **Ask each person present to jot down their definition of the term in a couple of sentences.**

⋯⃗ **Share the definitions on a flip chart, commenting on any differences or refinements, until you have arrived at a definition that everyone agrees with.**

You also need to be explicit, and to agree about on what would constitute an *increase* or *improvement* in these conditions, and to find ways of tracking individual progress towards such improvements over time.

Greenwich and Lewisham Young People's Theatre has devised a number of indicators to measure the specific outcomes which their HeadstArt project sets out to achieve. (See back of pack, sheet 8).

Attempting to measure this kind of progress in people's behaviour patterns can seem intrusive, so be sure to keep the bureaucracy to a minimum.

In order to measure enjoyment, HeadstArt uses drawings of faces, showing different facial expressions (e.g. angry, happy, tired, sad, miserable, worried) to ask young people to indicate how they feel at the end of a session.

A simple tracking form (see back of your pack, sheet 9) can be used to record an individual's progress over the course of a few weeks or months. The HeadstArt project starts and finishes each recording period with a face-to-face interview to discuss progress with each young person involved.

5 WRITING REPORTS

Contents at a Glance

Some people are good at writing reports, others find the task quite daunting. People can be extremely good project workers – and even project managers – but still find writing difficult, especially if the written language is not their mother tongue.

Improving Your Writing Skills

When you are writing accounts or reports about your project, these tips might be helpful:

- Practice makes a big difference, so keep going at it, a little at a time.
- It might help to clear your mind at the beginning of a writing task -to think about what you want to say. Jot down the main points you want to make on a piece of paper and then sort these into useful ideas. Put them into a logical sequence.
- Planning is a very important and a lengthy stage in writing anything. It includes reading, thinking, note-taking, organising your notes and drawing up a brief outline plan. The better your planning, the easier the writing stage will be.
- If you feel unsure about your writing, try doing a rough copy first and then ask a friend or colleague to read it and to offer helpful criticism.
- Don't be hard on yourself – it will get easier.

Clear Writing

The most usual kinds of writing you will have to do, in relation to your project, are:

- references or testimonials for participants and colleagues;

- news articles and press releases;

- short reports or papers for meetings;

- evaluation reports.

In every case, the best kind of writing is clear writing.

CLEAR WRITING MEANS:

- avoiding long and obscure words unless absolutely necessary - never use a long word when a short one will do;

- cutting out any unnecessary words or phrases;

- avoiding over-used metaphors or similes; think how some clichés irritate you and try not to add to them;

- avoiding jargon and professional-speak – try to express what you want to say in your own words;

- imagining you are writing for the intelligent non-specialist and not someone you think you need to impress;

- being critical of other writing you come across. Is the argument understandable? Is the language straightforward? Does the writing have a clear structure? Try to learn from other people's mistakes in how you approach your own writing.

Writing Project Reports and Evaluation Reports

This check list should help you remember the key ingredients of good short reports that could be written in response to an Appreciative Inquiry or Open Space meeting (see page XXX); a Participatory Review (see page XXX); or a project Self Evaluation.

THE CONTENTS SHOULD INCLUDE:

- **Context (both the wider context and the specific context)**
- **Task/Purpose (what you set out to do)**
- **Methodology (how you went about it)**
- **Data/Evidence (what you found out)**
- **Analysis (your interpretation of the data/evidence)**
- **Conclusions and Recommendations**
- **Executive Summary (a very short summary of the main points, conclusions and recommendations)**
- **References**
- **Appendices**

THE QUALITIES TO AIM FOR IN THE WRITING SHOULD INCLUDE:

- **An accurate sense of audience. Who is the report going to be read by?**
- **An appropriate tone and careful use of language. Is the tone and the language appropriate to the audience? Avoid jargon and clichés - otherwise your writing will sound boring and hackneyed. Less attention will be paid to what you have to say!**
- **A writing style which is clear and concise.**
- **A clear structure which is logical; well organised in sections and sub-sections; using a layout that encourages clarity and ease of reading; making incremental use of summaries and recommendations, section by section as appropriate; with an accumulated list of recommendations and an executive summary at the end.**
- **A sense of atmosphere and 'being there' - so that the reader is able to recognise the situation you are describing and to judge whether your recommendations make sense. This may be achieved via scene setting, case studies, telling quotes from the people involved.**

Whilst the content/focus or your reports may well be different, all reports benefit from

a clear structure that is planned in advance. The most straightforward structure is made up of a beginning, a middle and an end.

The **beginning** of the report should include:

- Executive summary
- Acknowledgements
- Aims (why you did the evaluation)
- The wider context
- The specific context
- The task (what you did)
- The methodology (how you did it)

The **middle** of the report should include:

- The data/evidence
- The analysis/interpretation

This is the hard bit! It needs to be put into logical order; with the order worked out before you start writing; in sections and sub sections; with summary points and recommendations relevant to the separate sections; in a way that balances description with data, evidence and analysis and which exudes atmosphere!

The **end** of the report should include:

- The conclusions and recommendations
- The references
- The appendices

You may want to break up the text with pictures or examples in boxes.

6 BUILDING IN SUSTAINABILITY

Contents at a Glance

Nobody likes the short-term nature of project work. It can mean that participants continually feel picked up and put down, and disadvantaged communities grow cynical about endless new initiatives that never seem to lead anywhere. Rather than building on strengths and consolidating important developments, project workers can feel always under pressure to come up with something new to catch the eye of potential funders. In this kind of policy and financial climate, it is important to build in strategies to sustain the work from the very beginning of the project.

Having sufficient funding is not in itself enough to make a project sustainable. To build up, and build on, successful work, you need:

- clear vision and values;
- good project management;
- staff/volunteers with commitment and energy;
- the ability to develop new areas of work;
- the ability to effect change within the community;
- effective problem solving;
- realistic strategic thinking and planning;
- the ability to demonstrate value and quality;
- effective relationships and partnerships with others;
- proper accountability to participants, stakeholders and funders;
- an exit strategy, even if you intend the project to continue.

It is worth distinguishing between the short term, medium term and long-term nature of the work you are involved in. In general the sustainability of projects depends on four ingredients, which need to be built in from the outset:

RESOURCES: funding is critical to get things going – in the long term it is better to seek funding from a variety of sources and link it to local issues and concerns, than 'dream up' projects to fit in with funding criteria;

KNOWLEDGE: this is the fertiliser that enables things to grow. Build in as many opportunities as possible for project workers and participants to acquire new and relevant knowledge to meet the aspirations of those involved;

SKILLS: be sure to recognise and make the most of skills people already have – create as many opportunities as possible to teach new skills and to hand over the responsibilities that go with applying them;

COMMITMENT: this is connected to raising awareness, engaging with issues and feeling concerned enough and enthusiastic enough to get involved. But people's lives are often difficult – build in plenty of support so that no-one feels excluded.

Partnership Working

Good partnership working is a vital component of sustainability. The most important ingredients of 'what works' in partnerships are:

- identifying and building on areas of common purpose and common concern;

- building alliances and minimising competition between groups and organisations;

- supporting individuals within partner organisations who are good at networking and who have good social and inter-personal skills;

- good communication – so that everyone involved is up to date on what is happening and doesn't feel out of touch;

- finding committed individuals, with credibility and legitimacy across the partnership, to take on any leadership responsibilities;

- supporting team members in partnership meetings who are committed to collaborative working and who don't have particular axes to grind;

- having a vision and shared understanding of critical issues that need to be addressed;

- developing the necessary political skills to assess risks and devise strategies for overcoming them.

Evaluating the Success of Partnership Working

There are five questions to be borne in mind when assessing the success of partnerships. Choose methods from Chapter Three (such as interviews, questionnaires, listening campaigns, SWOT analysis, open space, diaries etc) to elicit the answers.

EQUALITY OF PARTICIPATION: how far have you overcome any barriers to participation such as child/elder care provision, transport, cultural difference, language etc?

Useful indications of good practice might include:

- diversity is reflected at all levels of the partnership;

- equal opportunities policies are in place and implemented;

- unpaid workers/volunteers/activists are valued and reimbursed for their out of pocket expenses;

- a two-way information and communication strategy is in place;

- project procedures are clear and accessible;

- mutual understanding, knowledge and skills are developed to support partnership working.

CLARITY OF PURPOSE: do you have an explicit agreement about your shared vision, aims and objectives, based on jointly held values that everyone has signed up to?

Useful indications of good practice might include:

- a written agreement that everyone has signed up to;
- openness and honesty;
- trust;
- respect for the position and contribution of others;
- the willingness to engage in frank but constructive debate;
- the willingness to be open to challenge and change.

COMMITMENT AND OWNERSHIP: are the actions you have specified on paper really taking place?

Useful indications of good practice might include:

- regular meetings to plan and review what actions need to happen;
- all partners take action according to mutually agreed priorities and needs;
- a monitoring system is in place to record the actions being taken, by whom and to what effect.

TRUST: do members of the partnership trust each other and respect each other's status, irrespective of some having more resources than others?

Useful indications of good practice might include:

- respecting and accepting each other's contributions;
- listening to and learning from each other;
- debating differences of opinion in respectful ways;
- using clear and simple language in all communications;
- making sure that everyone has the support they need to contribute fully;
- explaining processes clearly;
- recognising and recording minority views.

CLARITY OF RESPONSIBILITY AND ROLES: is everybody clear about what resources and assets each partner is contributing and to whom they are accountable?

Useful indications of good practice might include:

- working practices are not overly elaborate or bureaucratic;

- the focus is on process and outcomes, rather than inputs and structure;

- financial commitments and responsibilities are clearly spelled out;

- assets such as staff time, ICT facilities, local knowledge etc are clearly spelled out;

- any conflicts of interest or responsibility are made transparent.

When Partnerships Go Wrong

When partnerships are good, they are very conducive to successful working relationships and project outcomes. But not all partnerships turn out to be happy or constructive affairs. Some partners contribute little to the success of a project and their behaviour does not reflect good practice. Self evaluation may well evidence and record what has already become painfully obvious to all those involved. It may encourage some partners to re-think their behaviour in the future.

When partnerships break down , involving bad feeling and acrimony, external (independent) evaluators can help. They can listen to all sides, check contradictory accounts of what is happening, collect evidence and make recommendations on the basis of their impartial assessment of the situation.

Lobbying, Funding and Mainstreaming

Building in sustainability to the work you are doing also depends on effective lobbying, securing additional funding and developing connections with mainstream services. Evaluation can play an important part in supporting these endeavours.

LOBBYING: Evaluation can show how your project is making a difference to individuals and communities. It can be used to support recommendations for change in service delivery by statutory services, or help make the case for new or improved community resources (see chapter Seven page XXX).

MAINSTREAMING: Evaluation can also help to 'make the case' for particular kinds of work, and working practices, becoming adopted by one of the statutory services.

FUNDING: The evidence gained from ongoing monitoring and evaluation often reveals the potential for new developments and the need for further funding. The quality of the evidence collected will be vital in persuading new funders to agree with you sufficiently to provide more money.

Top Tips on Funding Applications

BEFORE YOU APPLY:

- Research the needs you intend to address so that you can match these to the most likely funding sources.

- Gather all the facts, figures and background information needed for your application before you begin.

- Make sure you understand the purposes, priorities and policies of potential funders.

- Talk to funders informally about your ideas – this will help you decide the best fund to pursue and save wasting your time and theirs.

- Use evidence from current and previous work (about needs, background, successes etc) gathered from evaluation sources (eg participant's testimonies, interim reports, strategic documentation from your organisation etc) to write your application.

- Secure effective partnerships with like- minded organisations and apply for funding together.

- Discuss the budget proposals with colleagues and partners. Are they realistic?

WHEN YOU APPLY:

- Respond to the forms as accurately as you can.

- Draft and re-draft your application.

- Share the application with a critical friend before you finalise it.

- Ask for reasonably amounts of money.

- Demonstrate the need for your proposal with an indication of who will benefit.

- Explain your evaluation strategy.

- Explain your plans for sustaining the work.

- Explain how you will disseminate the fruits of your proposal and any lessons learned.

- Ask for feedback on applications

7 SPREADING THE WORD

Contents at a Glance

Letting people know about the work you are doing is important for three main reasons:

- it helps to spread the word locally and can lead to more and different people wanting to get involved;

- it communicates a sense of energy and action – the feeling that something good is happening – which is important in building a culture of activism and participation;

- it works to keep different organisations and funders on board and helps to commit them to acting responsibly when they are deploying their resources.

In the jargon of project funding, 'spreading the word' often gets referred to as project promotion or dissemination. In some, more political, contexts, it also includes lobbying and **advocacy** work.

Promotion and Dissemination

You may want to use quotes from your evaluation in promotional literature as well as short case studies and vivid photographs. You may choose to give presentations about your work to local bodies or at workshops and conferences. It's a good idea to always include participants who can speak with conviction and authority about their experiences in such activities.

Lobbying

One of the best ways of protecting valuable and successful work at local level is to make sure that the people with influence and power know about it. Sometimes you will want their endorsement in those arenas where decisions get made. This is also important in case the work triggers controversy. Community activity in a democratic society is not necessarily compliant. Encouraging community-led contributions to local policy making may well be a challenge to those officials and professionals who are not used to consulting residents or having to answer to their criticisms. It will be less easy to dismiss critical or angry exchanges if the groups involved are known to be engaged in the kinds of work that national and local policies seek to encourage.

Apart from project stakeholders and members of the wider community, therefore, there are other audiences who should hear about your work :

• cultivate the local press: send them press releases, photographs and 'good news' stories;

• produce briefings and updates for local politicians, key providers and funding bodies;

• make sure the work is known about by the Local Council, the Regional Government Office and your Member of Parliament.

Make sure that in any communications to politicians, funders and the press, you include:

• testimonies and endorsements from those involved;

• photographs showing activity and engagement;

• examples of the impact the work is having;

• evidence of the wider benefits of the work you are doing locally - and if relevant - nationally.

8 IN OTHER WORDS

The best way to involve everyone in the evaluation process is to use straightforward language and stay clear of jargon. The over-use of jargon has the effect of turning people off and keeping them out – especially if their first language is not English. It limits the sharing and growth of knowledge.

But unfamiliar and complicated-sounding words are not always the same as unwelcome jargon. Words used by specialists, and the knowledge that lies behind them, can be very reassuring when you are dealing with government bodies and other powerful agencies. Learning some specialist words helps to share the knowledge around.

Over the page are some definitions and explanations to help you better understand what is meant by some of the most common specialist words used during evaluation.

AIMS – are the three or four big, general ambitions which you want the project to work towards, and hopefully achieve. Aims are usually set out at the beginning and are complemented by a series of more precise objectives (see *OBJECTIVES*).

ACCOUNTABILITY – is the term used to describe the ways in which projects must be responsible in handling funds and reporting on their activities to the participants they serve, the funders who support them and the Charity Commission.

ADVOCACY – means speaking to others on behalf of the project and its participants. It is most effective when it involves encouraging and equipping participants to speak out on their own behalf.

BEST PRACTICE – quite simply, employing the best ways of doing various practical aspects of the work, good practices that have been proved to work well in lots of similar situations.

CAPACITY BUILDING – means making sure that individuals, groups organisations and communities have the 'know-how' and resources they need to grow and to achieve their potential.

EQUAL OPPORTUNITIES – an approach used to make sure that the policies and practices, rewards and opportunities within projects and organisations are just and fair. A commitment to equal opportunities is also intended to make sure that the interests of minority and less powerful groups are recognised and safeguarded.

ETHICAL EVALUATION – means employing moral and honest principles when conducting evaluation exercises – this should include respecting confidentiality and anonymity, seeking permission for people's words or images to be made public, reporting back to participants about what has happened as a result of their contribution.

EVIDENCE – is the information that is gathered to find answers to questions, and to make judgements and decisions. It is often referred to as either 'quantitative evidence' or 'statistical data' – which relates to factual things that can be counted, such as the number of people participating in, or completing, an activity – or 'qualitative evidence' which relates to how the project is experienced by those involved, such as personal testimonies and eyewitness accounts, videos, displays and performances. Qualitative evidence can be quite subjective.

EVALUATION - FORMATIVE – is ongoing and encourages you to take stock of things as you go along. It is a useful way of learning from what is happening and of making adjustments to address any difficulties as they occur. Formative evaluation should contribute to the learning process, not only to the benefit of the project and the partners, but also for the benefit of the project funders.

EVALUATION - SUMMATIVE – takes place towards the end of a project. The disadvantage of summative evaluation is that if it takes place when the project is coming to a close, there may be no opportunity to implement the evaluation findings.

IMPACT – refers to the wider effects of an activity, something that is more than the immediate results or outcomes, and which might prove to be important or significant to people later. It could be that some of these effects were not anticipated at the outset.

MILESTONES – are events, targets (see *TARGET*) or dates marking important stages in the life of a project.

MONITORING – means collecting information, usually systematically, in order to check on progress, make changes as necessary and making sure everything is moving forward as planned.

OBJECTIVES – are the specific outcome/results you want to achieve and which are set at the beginning of a project.

OUTCOMES – are the visible effects of a project. They can be specific and measurable - for example, how many participants achieved a qualification or a job, sometimes called 'hard outcomes'. Or less easy to pin down, such as feeling happier and more confident – known as 'soft outcomes'. Both are important. Outcomes can be anticipated in advance or happen unexpectedly in the course of the project. They can apply to groups as well as individuals. Unexpected and shared outcomes can provide as much learning, and be just as important as, achieving individual goals.

OUTPUTS – are the countable products created by the project such as the numbers attending sessions, or the numbers going on to training or employment. Outputs also include visible products like events, reports, training materials, exhibitions or DVDs.

OUTREACH – means making contact with local people over time and in familiar settings, in order to let them know about, and hopefully involve them, in your project. Outreach work involves building trust, local knowledge and good communication which take time.

PARTICIPATORY APPROACHES – means using methods that engage everyone involved in a project in the business of project planning, decision-making and evaluation. This needs good communication and also means giving careful feed back to all those involved.

PERFORMANCE INDICATORS – are measures for checking progress, shortcomings and success. They are often used in monitoring and evaluation. For example, you might decide that the number of young people contacting your project each month is a good indication - or 'performance indicator' - of how you are doing.

QUALITY ASSURANCE – means making sure that services are delivered to certain standards that are reviewed and improved over time.

REFLECTION – means thinking analytically about what is happening in a project, in an attempt to understand the impact you are having, and where necessary, to develop and improve things.

RISKS – in the context of projects, ' risk' usually refers to the possibility of things going wrong that are not anticipated or beneficial. Identifying and thinking through potential risks before they happen, and putting safeguards in place, can help to reduce any exposure to risks, both for the individuals involved and the project as a whole.

STAKEHOLDERS – are individuals or organisations with an interest in the project. This includes participants, project workers, management committees, partners, community groups, statutory agencies and funding bodies.

SUSTAINABILITY – is about equipping people, projects, organisations and communities with the necessary resources, knowledge, commitment and skills to help preserve and build upon initiatives, so that they can be continued into the future.

TARGET – is used to identify individuals or groups of people who are to be the main objects of the project's attention eg young people, asylum seekers, single parents etc. The term is also used to identify things which need planned attention, such as the date by when something will be achieved , the amount of money needing to be raised to deliver an activity, the number of people gaining a qualification etc. In the present political climate, policy makers, funders and evaluators usually like to know what targets have been identified and whether or not they have been met, including how and why.

VALUE FOR MONEY – means making the very best use of your available resources, in order to create as much advantage as possible for the participants but also to reassure trusts and funders that public money is being used economically, effectively and responsibly.

9 RESOURCES AND FURTHER READING

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

Evaluation Support Scotland: **www.evaluationsupportscotland.org.uk**

UK Evaluation Society: **www.evaluation.org.uk**

British Association of Settlements and Social Action Centres (Bassac):
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