Preface

Between April 1996 and March 1999, ASH Scotland ran the Women, Low Income and Smoking Project. As part of its work, the project funded and supported 19 community-based initiatives and looked at different approaches and methods of evaluation. A major theme to come out of the Women, Low Income and Smoking Project was the need for resource materials on recording and evaluation that was both informative and easy for community groups to access. The funded work and the following evaluations of the initiatives and project provided the learning from which this resource is based. An evaluation resource was drafted, pre-tested with initiatives from the Women, Low Income and Smoking Project and piloted with six initiatives funded through the ASH Scotland Tobacco and Inequalities Project.

To help produce, implement and disseminate the evaluation resource at local level, ASH Scotland commissioned Linda McKie and Joy Barlow to carry out a series of regional consultations, collate and review the feedback from the pre-test, peer review, pilot and consultation stage, re-editing the pack and a series of dissemination seminars with local practitioners.

The pack is based on the experiences of community groups in evaluation and is relevant to any groups and organisations carrying out monitoring and evaluation work within a health setting.

How are we doing? An everyday guide to evaluating community projects.

The journey starts here

Getting started

This resource pack is intended to be useful to community projects and organisations that are planning, reviewing and making judgements about their work. The contents of this pack have been influenced by the experiences and work of a range of community projects. The pack encourages projects in partnership with funding organisations to consider a number of issues when planning and recording community work. These include the following.

- What are we going to do?
- How are we going to get there?
- What do we need to record and review our work?
- What have we learnt?
- How can we share what we have learnt?

It takes about an hour to read the pack from cover to cover and we would encourage you to read right through it. If you do not have time to read the whole pack, you should certainly read the following sections.

The pack is based on the idea of a journey – projects need to get to the end of their work and record and review what they are doing along the way. Think about writing an application for funding, about getting a grant for a new piece of work, or being asked "How is your project doing?". Projects told us that they knew they needed and wanted to record their work over the lifetime of the funding. The material we collected proved very useful in planning ongoing and future work. But often the task of recording and reviewing project work seemed to be an add-on and not a central part of the journey of the project. Yet, time and time again community projects are asked to come to some conclusions about the effect of their work and, often, to send in plans for review with an application for funding.

Developing skills and knowledge in this area of community work is crucial to telling those you work with or those who become involved in your work about how your project is doing.

This resource pack will help you through the processes of monitoring and evaluating (recording and reviewing your 'journey') in a step-by-step guide (a 'map').

Monitoring is continually checking progress against your plan by routinely collecting information. For example, how many group sessions have you organised? How many people took part?

Evaluation is about making an assessment of your work based on evidence from recording activities. This is judging an activity's worth and considering it against the goals that the activity was meant to achieve. For example, in a project on community health, this means regularly asking what local people are getting out of meetings with healthcare workers. What were the outcomes of these meetings and how did different people feel about these?

Monitoring and evaluation often seem to be the same but it is useful to consider the difference between them. At the back of this pack there is a section called **Glossary** p77 and another section on **Useful groups and publications** p91. Take time to look at these sections now as they give more information on the terms used in monitoring and evaluation and on other sources of information and support.

Fellow map readers and writers

Acknowledgements

Many community projects and individuals gave their time to share their experiences and ideas with the authors of this pack. We would like to thank all the initiatives funded by the ASH Scotland Women, Low Income and Smoking Project and the Tobacco and Inequalities Project. These projects were key to developing and reviewing this pack. Janette English, Ayrshire Lone Parents Forum; Margaret Nicol and Ben Thompson, Deans Community Club; Christine McLean, Middlefield Community Project; and Marion Campbell, Tayside Health Promotion all willingly gave their time to take part in interviews to discuss their experiences of evaluation. In the second project, Tobacco and Inequalities, co-ordinators and facilitators made valuable contributions to reviewing the pack. We would also like to thank all those who took part in the consultation workshops and sessions and, in particular, those who provided written comments: Arlene Cook, Flora Douglas, Christine Ferns, Gillian Ferguson, Bob Leonard, Norma Neill, June Strain, Elaine Turner and Christine Whylock. June Strain, North Lanarkshire Council and members of the Chapelside Women's Health Project shared their experiences of evaluation in a snapshot of a previous evaluation journey as did members of the F-OFF (Fags out of Froghall) group, Grampian and Firth and Mossbank Family Centre, Shetland. An editorial advisory group commented on the final version of the pack and we would like to thank the members of that group: Margaret Black, Nick Bland, Sheila Duffy, Christine Herron and Margaret Nicol.

We would also like to thank Maureen Moore (Chief Executive, ASH Scotland) Sheila Duffy (Information and Resource Manager, ASH Scotland), Jennifer Black (Administration Assistant, ASH Scotland) and Ann MacInnes (Tobacco and Inequalities Project Evaluator) for their ongoing advice and support.

Map writers

About the authors

Linda McKie is Research Professor in Sociology at Glasgow Caledonian University. She led the national consultation exercise on the review of the earlier version of the pack, collected and analysed comments from a range of sources and made the final revisions. Joy Barlow is Strategic Programme Manager of Scottish Training on Drugs and Alcohol. She drafted the first version of the pack and reviewed this version. Paula Gaunt-Richardson is Project Manager for the ASH Scotland Tobacco and Inequalities Project. Paula has provided support to the various projects involved in developing and testing the pack, and co-ordinated the design and review of the pack.

Unfolding the map out

Using this pack

This pack aims to offer guidance on monitoring and evaluation by considering:

- why we monitor and evaluate;
- how to monitor and evaluate;
- why and when to change your plans for monitoring and evaluation;
- how to collect information and make sense of it; and
- how to present your information and share learning with groups and organisations.

Monitoring and evaluation are areas of your work that can improve the quality of the project by keeping you up to date with how it is doing, as well as providing information for funding organisations, and helping you plan future work.

We suggest you consider monitoring and evaluation from the earliest stages of your work – **when you are writing the application for funding or designing the project**. If those stages have passed, it is not too late to collect information on current and future work but it may be difficult to look back at all areas of your work. The sooner planning for evaluation starts the better, **but** it is never too late to start.

This pack has a number of sections on:

- planning your project and your evaluation work;
- who will be involved;
- the different ways you might collect information on your work;
- how to review this information;
- how to present material; and
- suggestions on how to share the learning from your work.

It is important to respect the rights of other people to confidentiality. When you ask people to provide information, you must ask for their consent. Please read the section on **Other issues to consider** p71, which also looks at the Data Protection Act and copyright law.

There are a number of reports and resources on monitoring and evaluation which you may want to read, especially for specialist advice on particular ways of collecting information.

There are three sections at the back of the pack that give you more information. The first section is a glossary of key terms and provides definitions of the words and terms often used in evaluation work. The second lists some **Evaluation questions that may be useful** p85 that you will want to think about when planning your monitoring and evaluation. The final section called **Useful groups and publications** p91 provides contact details for groups that may offer more help and support and give you brief reviews of publications and resources.

It’s a good idea to look at these sections now.

If you are new to evaluation work, you may want to read the pack through from beginning to end. Or if you have evaluated projects before, you may want to dip in and out, section by section. However experienced you are, you may want to think about the contents of this pack alongside other resources you have used.

In writing the pack we have tried to consider the many issues that projects face. We have designed this pack to take account of the wide range of skills and needs in community projects. At various points through the pack the experiences of projects are presented as **snapshots of a previous journey**.

There may be times when you do not agree with what we suggest, or you may feel we could have provided more information. If this is the case, look for other sources of information and advice. Most of us in community work are involved in monitoring and evaluation, and we can support each other just by talking about our concerns and sharing ideas. It may be that there are other local groups or networks working on evaluation that you could talk to or meet up with. There is much to be gained by talking over issues and problems.

Preparing for the journey

Planning an evaluation

It is important for anyone carrying out monitoring and evaluation work to ask themselves the following.

- Why are we doing this?
- Who is it for?
- What are we going to do with the information?
- What does our funding body or management committee want to know?
- How will we share our work with others?

Monitoring and evaluating community projects should be based on the principles of community development. By this we mean:

- people taking part in community development work should define their own needs, work out how best to meet those needs, and decide together on a course of action to achieve the desired outcomes;
- the return of control over the lives of the people taking part in the project who, through powerlessness and disadvantage, may have had this control removed; and
- involvement in monitoring and evaluation should encourage the people taking part in the project to feel they have a say in the planning and content of the project.

So you should remember these principles when you plan monitoring and evaluation work. You should work with the people taking part in a way that encourages them to give you their comments and opinions, and works towards answering the question ‘How are we doing?’

To plan your monitoring and evaluation work think about the following.

- What your project is about and what you hope it will achieve. What are the project's aims and objectives?
- What will you be doing to achieve your aims and objectives? What are your project methods?
- How will you know when you have achieved your aims and objectives? Or do you need to change these? You will need to build in regular reviews of your work.
- What will you have achieved at the end of the evaluation? For example, further work, a report, a collage, a presentation.
- What will you do with your experiences and any records of them?
- Think about how you might share what you have done and learnt with other projects and funding organisations.

Remember that your assessment of what the project achieves and how work progresses should be informed by looking at the information you collect. So evaluation can help you review ongoing work as well as decide on the outputs and outcomes of the project. Outputs and outcomes are terms defined in the **Glossary** → **p77**. Briefly, outputs refer to what you did, for example, achieving the aim of producing a video on exercise. Outcomes refer to the wider effect of the project, for example the local health centre may show the exercise video to patients recovering from heart disease.

To get going with your evaluation journey, you should hold an initial planning meeting, which should cover the following.

- What are the project's aims and objectives?
- What is evaluation, and who is it for? Who, apart from yourselves, needs to learn from your experiences?
- Who is going to be responsible for collecting the information you need?
- Why does the project need to evaluate its work?
- What do you need to find out about the project as it progresses?
- What will the activities be, and how will you regularly evaluate them during the project's life?
- How will you collect information on your project's work and the views of the people taking part?
- What resources will you need to carry out the evaluation?
- How will you distribute the project's findings and share these with other people? What might the different audiences need, (for example, the people taking part, funders, and the wider community)?

Most projects set aside 10 to 20% of their budget for the costs of monitoring and evaluation. Remember, it will take time to plan evaluation work and to timetable regular reviews of progress. You need to budget for these activities as well as writing up the final report. Who will review the information you collect, and might you need to find money for specialist advice? And don't forget to include time for people to write up the final report.

Make sure you discuss all these stages of your work at early planning meetings.

A key starting point must be deciding on the aims and objectives for your project and timetabling regular reviews of these. When you begin to write your application for funding or proposal for the project, you will need to consider the following.

Aims

Aims are statements outlining what the group or organisation is trying to do. For example, an aim might be ‘to set up a health advice service for young people (aged between 16 and 24) living in our area’. Another aim might be ‘to set up ways of involving young people in planning local youth services’.

Objectives

These are statements about what the group or organisation wants to achieve by a particular date. If the aim is ‘to set up a health advice service for young people (aged between 16 and 24) living in our area’, objectives could include:

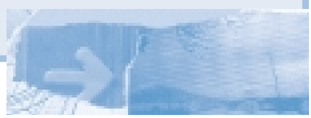
- publishing a list of local, relevant groups in the community;
- publishing a list of local social and health services;
- carrying out a needs assessment with young people;
- setting up a planning group based on the needs assessment;
- developing appropriate services; and
- monitoring, reviewing and evaluating the project work.

When you have agreed aims and objectives, you can begin to consider what information you need to collect and how you will do this.

Summary checklist

Planning an evaluation

- **What are the aims and objectives of our project? (Planning an evaluation ⇢ p15).**
- **Why do we need to evaluate? Who is this evaluation for? (Who will take part in the evaluation? ⇢ p23)**
- **How will the evaluation be carried out? (Planning an evaluation ⇢ p15)**
- **What information will be needed? (How to collect basic information ⇢ p25) (How far have we come? Reviewing your work ⇢ p65)**
- **How will you collect and review that information? (Basic information to collect ⇢ p57) (Making sense of your information ⇢ p61)**
- **How will it be used? (Presenting your findings and letting people know about them ⇢ p67)**
- **Write a timetable and think about the costs of the evaluation work. (Planning an evaluation ⇢ p15)**
- **What are the strengths and weaknesses of the group? Do we need to find help? (Other issues to consider ⇢ p71) (Avoiding pitfalls ⇢ p75)**



Review the sample plan for a 12-month project on the next page ⇢ **p20**. Regular review points are built in. Change this to suit the timescale of your project.

A sample plan for a 12-month project

Month 1

- Hold a meeting to review the project's aims and objectives, and to consider evaluation in the light of these. (See **Useful groups and publications** p91 for more information).
- Hold a meeting to plan the evaluation.
- Take account of people's rights. (See **Other issues to consider** p71).

Month 2

Work out what advice you need on monitoring and evaluation data and get that advice.

Month 3 (See **How far have we come? Reviewing your work** p65)

- Review your progress, using information you have already collected.
- Reflect on the project's aims and objectives
- Does anything need to change? If so, how?

Months 4 and 5

- Continue to reflect on progress, using your information.
- Take account of people's rights. (See **Other issues to consider** p71).

Month 6

- Hold another major review meeting.
- Consider if changes are necessary and why.

Months 7 and 8

As Months 4 and 5 above.

Month 9

- Hold another major review meeting
- Make decisions on how you will present and share your learning. (See **Presenting your findings and letting people know about them** p67)

Months 10 to 12

- Write up your final report and finish work on other outputs, for example, a collage or video.
- Talk with funders about sharing your learning.
- Give feedback to people taking part in the project.

Fellow travellers on the journey

Who will take part in the evaluation? What resources will they need?

Evaluation is exciting work that can really make you think about what you are doing and why. Just as community work should involve those who most directly benefit from the activities, so should evaluation work. Evaluation is for the project and for the people who take part in, and work on, the project. But you will also need to take account of the needs of funding organisations, local authorities, community plans and health boards. So the needs of the project and the people taking part have to be balanced with those of the funders and other groups.

Evaluation is 'resource intensive'. By this we mean it needs the skills and knowledge of people, the time of the people taking part in the project and of the facilitators, and resources such as paper, photocopying, postage and so on. Think about resources in the initial planning stage. This may highlight the strengths and weaknesses of your evaluation plan. You might decide you need to involve people or groups who can provide support on particular areas of your plan. (See **More information**, **Useful groups and publications** p91).

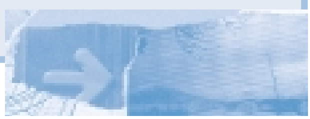
It is a good idea to decide the following at the planning stage.

- Who will take part in the evaluation process?
- Who will take the lead in it and co-ordinate the evaluation work?
- How will you help people to stay involved? What support will people need?
- Who will be able to give you support and advice?
- What part will those involved in the evaluation have in the end product (for example, the final report – whether that is written, photographs or video). How will this be shared with other projects and groups?
- Remember that there are many benefits to reviewing your work regularly.

Summary checklist

Who will take part?

- **Who should be involved in the evaluation?**
- **What are the strengths and weaknesses of the group?**
- **Do you need specialist help and support?**
- **What will this cost?**
- **Can the group share out monitoring and evaluation tasks early on?**
- **When will you review your work?**
- **Who will write the final report and think about feedback to others?**



Signposts for the journey

How to collect information

How you collect information for monitoring and evaluation will depend on the time, skills and resources that the project has or can call on. There are often hidden costs in evaluation, for example, staff time (this can include time to plan collecting information, collecting the information and writing it up), or photographic or video equipment. You should consider these and build them in to the costs and workloads in your planning process.

It is useful to identify at the beginning how long you will have for each stage of the evaluation work, and when you might review how things are going. Monitoring work is ongoing – collecting information as you go. Evaluation is an assessment of the information collected so the group can come to some judgement on the project work. It is important to set dates for when you will begin to review information and put together the final report. Please look again at **A sample plan for a 12-month project** **p20**.

You also need to decide what information you are going to collect, how and why. This will help you decide which are the best methods to use. To do this you will have to consider the overall aims and objectives of your project, and each activity within it that is being evaluated.

Some methods of collecting information are more time-consuming than others, and need specialist skills. It is unlikely that you will use only one way of collecting information. You will probably use several methods. So it might be useful to get advice if you are thinking of using, for example, video work, interviews and case studies. And what about the skills of people involved? Some might be concerned about reading, writing and working with numbers. Are there sex or cultural differences that might make some methods difficult to use? Again look at the sections **Useful groups and publications** p91 and **Other issues to consider** p71.

Match the method of collecting the information you want to the group's needs. For example, if you want to know how many people use your community centre, you could use a form to collect the numbers. If you want to know what users of the centre think about the various activities, you will need a method that gives people a chance to tell you. So you might ask a group to photograph their work (monitoring) and display the photographs with captions that are made up of a range of opinions and experiences (evaluation).

Remember that you need to ask people if you can collect information from them. For example, you need to ask people if they know why they are being asked to provide information and that it is OK for you to use it. If you are going to take photographs or videos, do not forget to get permission from the people taking part. Look at the section **Avoiding pitfalls** p75.

Below are suggestions for different ways of collecting information covered under the following headings.

- Project records
- Photographs
- Video
- Collages

- Creative writing, cartoons, art work and poems
- Diaries
- Interviews
- Focus groups
- Case studies
- Questionnaires

At the end of each of these sections we list some of the positive points and some of the possible problems when using that way of collecting information.

On page 57 there is a list of **Basic information to collect**. You can collect this information using a number of the methods listed on the following pages. This list is a guide and you should consider it with the information that the people taking part, the facilitators, funding organisation or management group are interested in.

Project records

You may already be monitoring your everyday work and activities through:

- information you used to decide what the project would do;
- agendas for meetings;
- minutes of meetings; and
- reports and documents.

In early planning meetings you should think about what you have that shows the work you have already done.

Agendas and minutes of meetings are important records of your work. Keep these safe and collect them when you begin to plan the project or activities. Review these when planning how to collect information and what might go into the final report or feedback sessions. You may have other reports, such as evaluation reports of previous projects, and you should review these. Also find out if there is a community profile or community needs assessment that the local authority or another group carried out. Is there a community plan or service plan that is relevant to your topic of work? For example, you may have done a profile of your community, listing other groups and services and considering what local people want your project to do. This information is very useful when writing the background to your project. You might also consider if there are groups or people in the community who could provide advice and support.

So, list what you already have and how you collect day-to-day information on what you are doing. Look at the section **Useful groups and publications** **p91**.

Positive points and possible problems.

You are already collecting a lot of information. But the type of records some groups keep can be different and difficult to use. If you are depending on minutes of meetings to record your progress at a general level, make sure these consider issues and how decisions are made – you need to document more than action points. There are skills involved in taking minutes, and you may need specialist advice on this. It may take time to find other reports and documents, and you will need to talk to other people in the local authority, health board and library to find out what is around that can help you.

Example of an agenda for a project planning meeting

Duntown Community Centre: Fruit and vegetable co-operative project

Agenda

1 Welcome and introductions.

2 Minutes of the last meeting.

3 Matters arising from the minutes that are not elsewhere on the agenda.

4 Update on project activities.
   a Collecting fruit and vegetables from the market.
   b Invoices and bill payments.
   c Staff for the co-operative.
   d Opening hours.

5 Planning the evaluation strategy.
   a Reviewing aims and objectives.
   b Who will plan and take part in the evaluation.
   c Resources for the evaluation.
   d Feedback to funders on the progress of evaluation plans.

6 AOB (‘any other business’)

7 The date, time and venue of the next meeting.

Make sure you ask for items for the agenda at least two weeks before the meeting and send the agenda a week before to everyone who might take part. You should send the minutes of the last meeting with the agenda so people have time to read and comment on these and think about future work.

Example of minutes for an item on the agenda

Duntown Community Centre: Fruit and vegetable co-operative project

Item 5a Reviewing aims and objectives

The people at the meeting reviewed the application made to funders for the project grant. AZ reported that she had been in contact with the funding organisation who were keen to:

- have information on how the group set about meeting its aims and objectives;
- have a review of all activities and records of the views of those who took part;
- record what, if anything, went wrong and how the project dealt with that;
- record and negotiate any changes in the aims and objectives with the funding organisation; and
- identify anything the project has learned to share this with the funding organisation and other projects.

As a starting point to evaluation plans, the group were asked to review the aims and objectives written several months ago and consider any changes they might want to make now. BW suggested that the overall aim ‘to set up a community co-operative to provide affordable fruit and vegetables for local people’ be agreed. This was accepted by everyone at the meeting. CT suggested that the group might reconsider the objective ‘to carry out a consultation exercise to find out who might become involved in setting up the co-operative at the community centre’. The community centre has limited opening hours on certain days of the week and this could make access difficult for some people. After discussion, it was agreed to consider other venues for selling fruit and vegetables, and to change the first objective so it did not mention the community centre.

In summary, the aims and objectives were agreed as follows.

Aim

To set up a community co-operative to provide affordable fruit and vegetables for local people.

Objectives

1 Carry out a consultation exercise to find out who might become involved in setting up the co-operative.
2 Set up a local group to oversee the development of a co-operative.
3 Find out what fruit and vegetables local people buy, where from and how much they pay for them.
4 Find out what local people would like to buy, can afford and where they would like to buy from.
5 Use a number of methods to evaluate how fruit and vegetables are provided.

It was also agreed that objective 5 would be the responsibility of an evaluation planning group and this would need to be set up as soon as possible.

Photographs

Photographs are a good way of collecting information on what you have done. They can 'bring alive' an activity or event. Photographs can illustrate 'before and after' experiences, show progress, and illustrate conclusions.

Some points to consider.

- Make sure you know why you are using photographs, what you will photograph, and how you will use the photographs.
- Have you got the appropriate equipment and a competent photographer?
- Will you use black and white or colour prints? Black and white reproduces better and often captures expression better than colour film. It might be an idea to look at some examples before you decide which to use.
- How much will it cost?
- How will you ask people if it is OK to take their photograph? You need to tell people why you are taking the photograph and what you plan to use it for. Make sure you keep a record of people's permission.
- Organise a good way of displaying the photographs – it can be disappointing for those who have had their photograph taken if it never goes on display.
- Decide what you will do with the information in the photographs – how will you describe the work? Do you need other information to record all the work of the project?

Positive points and possible problems.

Photographs can be fun and very useful in recording work. They can bring alive a presentation or report. But there are costs: cameras, camera hire, films and developing the film. And black and white photographs are more expensive to develop, although black and white photographs are easier to photocopy. You need to be able to use decent cameras and have someone who can take good photographs. You will need to ask the people in the photographs if it is OK for you to use them. And there may be copyright issues if you are using photographs that the project did not take (see the section **Other issues to consider** ⇢ **p71**). You will also need to collect other information so you can fully describe the work of your project and make an assessment of what you have done (outputs) and wider implications (outcomes).

A snapshot from a previous journey

F-Off (Fags out of Froghall) Group

Below is a photograph from the F-OFF group, based in Grampian, of three young people playing snooker with cigarette packets. The project was funded to support the development of alternatives to tobacco use, in particular physical fitness, for young people in the area. Photographs were taken of activities and events to provide a record of these for the people taking part and for use in the evaluation.

Video

Like the other less traditional methods of collecting information, videos put across powerful messages as part of monitoring and evaluation work. Please remember that the idea of making a video is an attractive one for some people – they may like the idea of being famous for 15 minutes! Nevertheless, there are a number of things to think about before deciding to go ahead.

To start with:

- Have the group the technical expertise? If not, where will you find it?
- Has the group the funding to script, record, edit and print the video?
- Do the people taking part in the video realise that the video will be around for a long time?
- You need to give people the option not to be in the video. How will you do that?
- Don't forget you need to build up confidence to appear in the video and do voice-overs.
- Once again, will you use the video at the end of the project, and will other projects or groups be able to use it? If so, you need to let everyone know from the beginning

If you decide to go ahead, you need to think about the following.

- What is the video to be about? How does it fit in with other monitoring and evaluation work?
- Who will take part and why?
- Who will write the script?
- Who will record, edit and print it? How many copies will you have?
- Who will it belong to, and how will it be used in the future?

- Will it need some written material to go with it?
- If you are going to use music or other published work, you will need to get permission. You can use music that is not covered by copyright or you can buy CDs where copyright is included.
- Work out the cost of equipment or its hire, and its use.

Do not forget that people can learn new skills by getting involved in the video work. But editing can take much longer than you think and can be expensive.

Positive points and possible problems.

The costs of making a video and the time and skills needed can make it difficult to use for monitoring and evaluation. Editing takes a lot of time and is skilled work – you may need to find someone early on who can do this work, or work with the people taking part to do it. One project we worked with took 12 hours of tape and, after editing, this became 10 minutes of film. They learnt a lot from the filming and editing processes but they underestimated the cost and the time it took.

Who has final control of the content of the video? Don't forget to decide this early on as well as costing all the work. As we mentioned above, be careful about the use of background music (see **Other issues to consider** p71 and **Useful groups and publications** p91). Although you can buy CDs that include copyright, check this before you buy them.

If you can sort out these issues, you can have a lot of fun doing this type of recording work. It can also sustain project work over weeks and months and can be useful in presentations. But this is a record of work that may not tell the whole story of your project, or give an assessment as to whether or not you met your aims and objectives. You will need to record and assess other types of information. Also, people who do not have technical and acting skills can feel left out.

A snapshot from a previous journey

Video recording at a residential weekend

Project title: Chapelside Women's Health Project

Aim: To raise awareness of health issues that affect the lives of the people taking part as well as their families, such as poor housing, living on low incomes, poor diet, and a lack of exercise.

Evaluation method: Video work with a hand-held camera. This was used as a method of evaluating a planning and review residential weekend. People who took part were encouraged to give their opinions and views on the purpose of the residential weekend and whether or not it had been successful in dealing with the issues identified when the event was planned. For example, had the members enjoyed the residential activity as a group and what changes and planning had to be put in place for future residential weekends? It also gave the people taking part the opportunity to talk about and deal with any underlying concerns in a way that was easy to record.

Comments: This method of evaluation was effective for this event as all the comments could be recorded. The information is on video and can be reviewed at a later date for use when evaluating the progress and success of the group, or when

A snapshot from a previous journey contd.

trying to apply for future funding.
Every person had a chance to voice their opinion. There was no pressure for members to contribute, but most felt quite comfortable to use this as a method of evaluation as opposed to more traditional methods of, for example, questionnaires.

Conclusions: When recording, the facilitator may need to keep the group discussing relevant topics and try not to have people talking over one another. It is also important to encourage all members to contribute towards this method to give an even balance of opinions.

Collages

This is another useful way of recording your work. A collage is a very practical way of displaying work, activities and thoughts using single words and images taken from, for example, popular magazines, newspapers, catalogues, art work and photographs, to express feelings and views. Images can be a powerful tool in discussions and can be looked at again in later sessions.

The group members do not have to put their names to a collage. You might use a collage to illustrate the way the group felt about a particularly sensitive activity, for example, what it means to be a parent, have a low income, and be a smoker.

Collages can give group members an opportunity to explore what certain topics of activities mean to them. It is a very practical way of recording work that brings people together in planning and finishing the task. Using single words and images taken from popular magazines, newspapers and catalogues, the collage can help people express how they feel about a project and the significance it has in their lives. The images can be a powerful tool in discussing views and experiences. The collage can also be looked at again in later sessions of your project work.

Positive points and possible problems.

Collage work can be enjoyable and bring a group together through planning the collage and the work on it. They are useful for starting discussion on a topic or activity but you will need to explain the relevance of what you have done and how the work developed as time went on. As group members do not have to put their names to the final product, they may feel happier about giving their views.

Collages are useful in presentations to other groups but they cannot be used in final reports – although a photograph of them may be, with the agreement from everybody involved. Collages can be difficult to store and carry about. Be careful about using images from newspapers and magazines that may have copyright issues (see **Other issues to consider** p71). Also a collage will have a limited life – it reports events and views at one point in time. So again, it is likely that you will need to collect other information.

Creative writing, cartoons, artwork and poems

Recording information through creative writing, cartoons, artwork (drawing and painting) and poems can be very powerful and moving. It is important to encourage people to be creative because quite a lot of the people taking part might feel they have no creative skill, or may have been told they have none! You may be able to get advice from local arts and recreation departments, or invite a writer, artist or cartoonist to one of your sessions. Building up confidence to write and draw can take time, and sharing examples of the work of other people may help.

Creative writing, cartoons, artwork and poems can be used, for example, to express emotions about a process, to record an important event or to describe how you feel when something is coming to an end.

If you are thinking about creative writing, cartoons, artwork and poems, you might want to consider the following.

- Why do you want these to be part of your evaluation?
- Can the people taking part give enough time for this work?
- Remember that this is not a writing competition. You should value whatever people create. Make this clear from the beginning.
- Make sure that people know why these activities are being carried out, and where and how the material might be used.
- Allow people to decide if they want to put their names to it or not.
- Will they get their original back? If not, why not?
- How will you use this work in the final report and presentations?

Positive points and possible problems.

Creative writing, cartoons, artwork and poems can be powerful ways of collecting information but this type of work can be difficult for some people. They may be concerned about their writing and drawing skills, and earlier experiences may have left them feeling that creative work is not for them. Some people can become emotional and so there must be time to discuss the work they have produced and to refer them to advice and support groups.

As with photographs and collages you will need to collect other types of information to fully record and assess project work. In presentations this work can be very powerful and build confidence for authors to read out or display their work. With the permission of the author you may want to print work in a final report.

A snapshot from a previous journey

A poem on food and diet

Hard tae diet, easy tae please

Irn Bru and fries
Burgers wi' cheese
Hard tae diet, easy tae please

Crisps frae the weans
Raid the deep freeze
Hard tae diet, easy tae please

Chocolate muffins
Whipped cream a tease
Hard tae diet, easy tae please

Joined the support group
Others like me
Hard tae diet. But no seconds, please!

This poem was written by a mother living in Fife when she was asked to think about food and the Scottish diet. She did not want to give her name but was happy to have the poem printed for others to read.

Diaries

If you decide to ask people to record their thoughts and experiences in a diary, remember that this can be time-consuming and have implications for privacy and confidentiality. Talk about the issues with those involved. Some people can be concerned about writing regularly (they may be concerned about their writing and reading skills), and some people may be concerned about who might read what they write. So you need to think about the following.

- Is the diary going to represent a typical experience or something unusual?
- Make sure that people know why they are being asked to keep a diary, and what you are going to do with the information.
- Will people collect information and write about their views and emotions?
- Consider the use of diaries on a regular basis. Is everyone happy with what they are being asked to do? Do you need to reconsider the advice on what to write and when?
- Who will read the diaries? Consider the confidentiality aspect of keeping a diary.
- Take time to check the progress of the diaries with the people writing them.
- Decide what you will do with the information – how will you analyse it and make sense of it for a wider audience?
- How will you use the information in a final report and any presentations?

The group will need to decide on some ground rules for how and what to record.

Positive points and possible problems.

Diaries can allow people to record what they have done and write down their views on this. As diaries are filled in regularly it is possible to get views soon after meetings and activities. But diaries can cause concern – some people may be concerned about their writing skills and who will read what they write. And it is difficult to use diary material in a final report or presentations. You must get permission to use material from the people who have written the diaries. Diaries can be good for collecting information on what has happened. But through recording people's emotions and thoughts it can be difficult to use material in reports and presentations.

A snapshot from a previous journey

Extract from a diary

The author took part in an initiative in the Shetland Isles, funded under the ASH Scotland Tobacco and Inequalities Programme of Work. They filled in the diary regularly but their entries tended to follow key events and thoughts.

I have been smoking since the age of 8, initially to be one of the gang, then later it helped me through teenage problems, so it went on and on.

I never really wanted or tried to give up the habit because I do enjoy a fag. But four years ago my husband became ill and by this time my smoking and the occasional drink has steadily increased.

Last year I turned 40. I think this age starts you thinking of the past, present and future, life changes, close family, illness and death.

A snapshot from a previous journey contd.

The first night the group got together we discussed so many things we would like to do, not just smoking but health issues in general, healthy eating, exercise, relaxation and so on. We decided to create a relaxation room. We had lots of fun painting the room and setting it up.

And then came the official opening. We had lots of invited guests and we decided to make a policy of non-alcoholic drinks with cheese and biscuits. It went off very well, all in disbelief of the non-alcoholic wine!

I think the creation of the room has been the foundation and bonding of the group. I feel we can go from strength to strength. Although there are a few ground rules to be laid down within the group, also a name to be created and some ideas to fund ourselves for the future, I know it is a great thing for our small and rural area of the Northern Isles.

As for the future, I personally would like to start the New Year off by not smoking, to lose weight, take some exercise alone, and with the group, and begin some hobbies.

Future for our group. I would like some of the overconfident to lose a bit so they are nicely confident, the nicely confident to stay as nice as they are, and the not-so-confident to gain, so they too can be nicely confident. But in saying that, all our differences make us the nice group we are. I just hope we all stay together and get stronger and help each other along the way.

Interviews

Interviews with individual people can be useful in finding out about their views and experiences of project work and activities, as well as recording basic information on, for example, their age, the activities they have taken part in, and how long they were involved in the project. Interviews can give an insight into people's views and experiences in a way that many other ways of collecting information cannot. If you want to find out how your project is doing or has done, you should ask for the views of people who are currently taking part in the project, or those who are directly affected by it. You should also speak to those who were not so directly involved but still in a position to give an informed opinion about it, for example, the person in the local authority who provides some resources or acts as a link to useful services. It is useful to get views from a range of people taking part and groups on the same topic. Deciding who to interview will depend on what you are trying to find out. For example, if you are trying to find out about alcohol and health services in your area, it would be useful to interview someone from a drug and alcohol project, as well as drinkers and non-drinkers who live in the area.

Before you interview somebody, work through this checklist.

- Brainstorm a series of questions and topics with project members and staff.
- Plan the interview and consider what you want to find out, but also give the person you are interviewing the opportunity to add comments and views.
- Write out the questions, keeping them straightforward and free of jargon. Use plain, simple language.

- Test out the questions with a colleague before you use them in interview, to make sure they are easily understood, and deal with the issues you need to.
- Review the length of time the interview might take. Aim for 30 to 45 minutes (though some people will talk for longer!) as this length of time would be acceptable to most people.
- Decide how you will record your answers. If you take notes, remember that you will lose eye contact with the person you are interviewing while you are jotting down your notes. Also, you can get lost in taking notes and lose the thread of the interview.
- It is important to ask the person you are interviewing for their permission for you to take notes or tape the interview.
- If you are taping the interview, do you have a tape recorder or can you borrow one? Have you got a spare tape and batteries?
- Who will transcribe the tape? Remember that one hour's tape takes at least three hours to type up. Also, will you expect that every word that everyone says is typed out, or the general meaning of what is said?
- Have you arranged who will transcribe the tape? How much will it cost? Are there time and skills available to read the transcription and draw out the key themes, issues and quotes?

If you do choose the interview method, remember the time factor and don't interview too many people. A selected sample may work best, as long as it is not chosen to favour the answers you want to hear! Provide reasons for your choice of sample. For example, Person A took part in all the sessions, while Person B only went to one session. You use interviews to record how people felt about the project as it progresses so remember to interview those who took part in all or most sessions or activities and those who did not.

You should think about the following when contacting people you would like to interview.

- Invitations – these are better in a letter than by phone as in a letter you can clearly outline what is expected and what the interview will cover. Remember to include a slip for saying 'Yes' or 'No'. You also need verbal or written agreement to the interview. You need to reassure the person you want to interview of confidentiality. Let them know what will happen to the information and views they give during the interview.
- If you arrange an interview by phone, you will need to send or give people a sheet outlining your project and the content of the interview. You must also get their written and signed agreement. Agree the length of time of the interview. See the section **Avoiding pitfalls** p75.
- Location – arrange a safe, quiet and convenient meeting place for the interview that everybody agrees with.
- Childcare or other caring roles – if the person you are interviewing has childcare or other responsibilities, can the child be looked after during the interview? If you cannot provide care while the person is being interviewed, can you help with the costs of care arrangements?
- Might you need a translator?
- What happens to the material – remind the person you are interviewing about the arrangements for transcribing the interview and giving feedback, and what will happen to the information they give.
- Be organised – try to be as well-prepared and efficient as you can be. The person you are interviewing is giving up time and providing you with important information.
- Don't forget to thank people for giving up their time to be interviewed.

Positive points and possible problems.

Interviews can be a relatively easy way of finding out both what people have done (monitoring) and their views and assessment of what has happened (evaluation). Review your ideas and questions with other people and get advice from people with experience before you invite anyone for an interview. Schedule in time for this.

Don't forget to explain the interview process and ask people for permission to use the information. Some people may ask to see what you write up from the interview, and you should give them the opportunity to see it. Remember that people are giving up their time to talk to you so you should thank them. You can use material from the interviews to illustrate a point, provide an example, and highlight people's views on a topic or project.

Focus groups

Focus groups are often used by market researchers who want to find out if we like a particular soap opera or might be tempted to buy a particular product. Political parties are using them more and more to find out what people think about particular policies. You may decide to use them to discuss a topic or series of issues with a group of people.

Focus groups can be person-to-group interviews, with usually six to eight people and a facilitator. The aim of a focus group is to encourage everybody to talk to each other and debate among themselves on a topic or series of questions.

Once again, a checklist may help you set up and run a focus group.

- Brainstorm and choose a list of topics or questions (not more than three or four) to get the discussion going.

- Decide who will lead the focus group – what skills will they need? For example, it is important to draw everyone into the discussion (remember the quiet person in the corner), and you need someone who can bring them into the debate.
- How long will the focus group last? We suggest no more than an hour.
- It is much easier to tape the focus group and then have the tape transcribed. It may be difficult to work out who said what, but that matters less than the ideas and information that are exchanged and possibly challenged.

Look again at the section **Interviews** and the points made about contacting people on page 45. Consider what it means to be asked to be involved in a focus group.

Positive points and possible problems.

Focus groups are a great way of collecting information on people's views on a topic or project. They take time to set up and not everyone invited may turn up.

One word of warning! Taping the voices of six or more people who might talk over each other can cause problems when someone has to type up the contents of the tape. Try to make sure only one person speaks at any one time. Ask people to introduce themselves the first time they speak. Make sure you have a good microphone, a back-up tape recorder, batteries and tape – technology can let us down. Also, ask a member of the project to sit in and take notes just in case too many people speak at once or you find the tapes are unusable.

As with interviews, you need to tell people beforehand what you expect of them, and you need to have their permission to use the material collected. Material from focus groups often needs to be used alongside information on numbers (for example, the number of people who took part) and activities (for example, photographs of a workshop, or a collage produced by a group on a particular topic) as well as information from your project records and relevant reports.

Case studies

You may want to show in detail the effect of a particular activity on one person, or a person's response to the project as a whole – a 'before and after' description. You can carry out case studies to follow up and add to the material you have collected by other methods. They can also be developed from one or two interviews. Case studies can be useful if you want to highlight an issue of specific concern or an interesting feature.

Case studies are sometimes criticised because they cannot be generalised and only study single events or individuals. Nevertheless they are good at giving 'real-life' snapshots of what has been achieved.

A snapshot from a previous journey

The Women, Low Income and Smoking Project

Aim: 19 small grant awards were made to community projects across Scotland to carry out work to develop community-based approaches to tobacco control. The project was developed by ASH Scotland with funding from the Health Education Board for Scotland. An objective of the project was to make recommendations on methods for working in communities based on evidence from the work of the projects.

A snapshot from a previous journey contd.

Method of evaluation: the decision to do case studies as part of the evaluation of this programme of work was made because the information collected from the final reports of some projects did not tell us enough about certain areas of their work and the impact of this (outcomes). For example, the case studies were able to provide in-depth information about the benefits and outcomes for the group and organisation as a whole, about the reflections of the workers on organising and planning the work, and about the views and experiences on the evaluation process itself.

Resources did not allow for case studies of all the 19 initiatives funded, and five were chosen to reflect examples of a range of work. They were chosen to explore a number of issues, such as what their group or organisation was like, where it was based, what methods they used, who took part in the group or organisation and what the outcomes were. We gave them a series of questions to guide the interviews and focus groups that were carried out with the facilitators and members. Key themes were drawn from this information, and these formed the basis of a case-study report. As a result, these case studies supplemented the information that had been collected by the groups and the project manager, and through final reports.

Comments: the case-study method allowed the initiatives, the funding body and the management group to explore in some detail particular approaches to tobacco control work using a community development approach. It did take up time and resources and some projects were concerned that people who were not connected to their work were collecting

A snapshot from a previous journey contd.

information. But the details they collected helped to illustrate the new and original work of projects on such topics as taking part and planning.

Positive points and possible problems.

Case studies draw on and bring together other sources of information, for example, project records, interviews and photographs, and often include new material collected through using methods such as interviews and focus groups. They can be useful if you want to explore a particular theme or topic across a number of activities or projects. For example, there may be a group or activity that has taken off in terms of numbers of members and activities, and this can lead to groups being set up in several other areas. A case study of these groups could highlight that development. In any final report you would need to report the case study as well as the information collected on the project as a whole. So when reporting on the Women, Low Income and Smoking Project, information was provided on all 19 projects, and in-depth information provided on the five projects in the case studies.

Questionnaires

If you want to collect information on the numbers of people taking part (how many came to a meeting, what their ages were, and so on), a questionnaire may be the best way. You need to make sure you produce a well-designed questionnaire that will give you all the information you need, and one that will give you few problems at the stage of having to make sense of your information.

It is important to get specialist advice and support on designing, using and analysing questionnaires. Look at the section **Useful groups and publications** p91. Always test a draft version of your questionnaire and consider the costs of printing, sending out, collecting and analysing the questionnaires.

If, after specialist advice, you decide to go ahead with a questionnaire, think about the following.

- Keep the questions and language as simple as possible. If you do ask for a short description (for example comments on the group activity), make sure that your question:
    - is easy to understand
    - doesn't lead people into agreeing with emotive statements; and
    - is tactful if it covers sensitive issues.

Examples of different sorts of questions include the following.

- a '**leading**' question:
  'You don't smoke more than 10 cigarettes a day, do you?'
- a '**closed**' question:
  'Do you smoke?' (They can only answer 'yes' or 'no')
- an '**open**' or **useful** question:
  'How many cigarettes do you smoke each day?'

- Try to use 'tick-box' type questions instead of 'please write in' ones.
- Make the collection points for questionnaires easy for people to get to. If not, you could ask people to post them back to you, but remember how much this might cost.

Look at some of the publications listed in the **Useful groups and publications** p91 section. Many community projects decide to do a questionnaire and then find themselves with a range of problems. These problems can be summarised as follows.

- Questionnaires are often too long and ask questions that are not relevant to the aims and objectives of the project and the monitoring and evaluation work.
- People can have concerns about filling them in if they have difficulties reading or writing.
- People can be concerned about what the information collected will be used for.

Positive points and possible problems.

Ask yourself 'Will a questionnaire give the project all the information we need, and do we have the skills and resources to do this?' You need to test out a draft version and try out the contents and language. Keep it simple – the more complicated the questionnaire, the more time and skills you will need to review the information. Consider **all** the costs. Who will you ask to fill in the questionnaire? For example, will you ask just some people or everyone who came to the project? What happens if only a few people reply? Will you post the questionnaire out? If so, have you costed this and the costs of a reminder letter? If you are going to ask people the questions, are project staff or members available and happy to do this?

Questionnaires can provide a lot of useful information on a project, especially on who takes part, when and where. They can provide information, along with your project records, that describes what happened and who came along. But to come to an overall assessment of your work, you will have to find ways of collecting people's views and judgements. At the very least this will mean using both closed and open questions, or questionnaires with other types of information such as collages, focus groups or interviews.

Finally, most people need specialist advice at the design stage and when they want to make sense of what they have collected. Be careful that the person you have asked to give this support is a local person or knows people in your project and area. You should also consider confidentiality, especially if people are going to be asked questions on sensitive topics, for example, drug or alcohol use.

To end this section we have given an example of an evaluation in which changes had to be made to plans at an early stage of the project. As a result, a range of methods were used to collect information for the evaluation.

A snapshot from a previous journey

Making evaluation fun: The commitments evaluation

Aim: to provide a range of support activities as well as to encourage people to think about their attitudes to smoking and personal choices.

A snapshot from a previous journey contd.

Evaluation work: a key objective of this work was to create a culture where individuals' expectations and goals were respected. It was not possible to formalise an evaluation regularly for individuals as first planned, for example by using diaries. Concerns were also raised about people's reading and writing skills and confidentiality.

Outcome: at the end of funding the group told their story through a collection of photographs, taken as the sessions progressed, and in the group collage. These photographs were reproduced in a final report, together with a summary taken from material that was collected through the group and individual exercises and recorded weekly through the minutes of meetings and information collected on the numbers of people who took part. This meant an extra commitment from project workers to write up notes and send these to other people for their agreement. But everybody agreed that evaluation work became fun and useful, and were pleased that they changed their early plans to use diaries.

Conclusion: using different methods of monitoring and evaluation can ease pressures, become fun and add to the varied work presented in the final report. It is also important to collect everyday information on planning, activities (minutes and photographs) and the views of members by keeping notes on reviews of weekly sessions.

Mapping your progress

Basic information to collect

Below is a guide to the basic information you will need to collect on your project. Remember, this information will not tell you much about people's experiences and views of the project work. And it will not explain a number of things, such as the changes in the people who took part (for example, why one group kept going while another fell apart just after the start of the project). To answer this and explain other topics and issues you will need to use some of the other ways of collecting and recording information.

The project

- The title of the project.
- The aims and objectives of the project.
- The structure of the project, for example, the management committee.
- The timetable for work.
- A history of the project's work – there may be other reports that tell you about this.
- Information about why you chose the aims and objectives of the project.
- Costings in the application for the project and evaluation.

Project activities

- Since the application stage have the aims and objectives changed? If so, why?
- What were the start and completion dates?
- What types of activities were proposed? If these changed, why?
- What were the dates, times and venues for activities?
- What resources and materials did you use and where did these come from?

People taking part

- How many people came, and who were they? What was their sex, age, and ethnic background, and where did they live?
- How did you get people to come along?
- Were there kinds of people you wanted to attract? Who were these? Why? And did these people join in?
- Who left the project before the end? Did they say why?

Project workers and volunteers

- What was the background of the workers and volunteers, and how many took part?
- Did the number and type of workers and volunteers change? If so why?
- How much time did the workers and volunteers spend on the project? How were they involved?
- How were workers and volunteers managed and supported in their work?

Funding

- What was the grant award?
- Did you manage to raise extra income? If so, where did this come from?
- Did you receive any resources in kind? For example, free use of a community centre or a session run by another project in return for you running one for them.
- Keep a regular breakdown of spending.

The evaluation and final report

- What were your plans for evaluation and reporting in the application?
- Did you cost these?

- How do you plan to monitor and evaluate the project? How will you collect information?
- How did you decide on what went into the final report?
- What were the costs of the evaluation and final report?
- What went well and not so well with the monitoring and evaluation plans?

Outputs and outcomes

- What did the project produce? For example, report, photographs, presentations, newspaper articles (outputs).
- Did the project have a wider impact (outcomes) on the local community, the topic of work or the organisation the project is located in?

At the end of the pack there is a list of questions you might want to think about (see **Evaluation questions that may be useful** **p85**).

Consider the basic information and evaluation questions alongside what you need and what the funding organisation may ask for.

In your final report it is not necessary to follow the question format we have provided, but these questions should help with your plans for monitoring and evaluation, especially when you consider what information you need to collect and how you are going to do that.

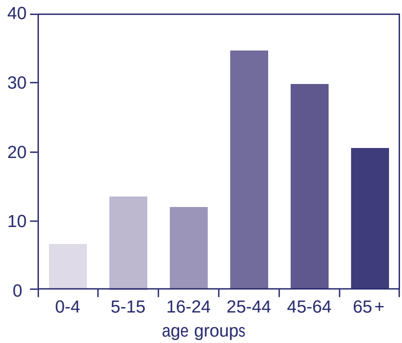
Reviewing your mapping work

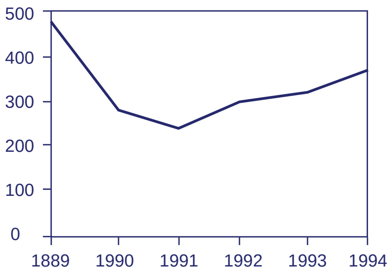
Making sense of your information

What happens after you have collected all this information? You need to come to some conclusions. Has the project met the aims and objectives? How does your information help you to come to your conclusions?

Make sure that more than one person is responsible for interpreting information, and think about different ways of presenting findings, for example, in tables, bar charts and pie-charts for numbers, and quotes from interviews and focus groups.

Duration	1980	1985	1995
Birth	87	87	90
1 week	82	83	84
2 weeks	80	79	83
6 weeks	74	71	73
4 months	59	54	56
6 months	50	45	42
9 months	31	23	31





"This group was a real support when I most needed it"

You can reproduce photographs in final reports, along with photographs of a collage or stills from a video. Collages, photographs and videos can also be very useful for presentations. There may be themes that keep coming up in your information and you should group together all the information on that. For example, if people found taking part in evening meetings was made difficult by poor streetlighting, then in the final report on the project you might present:

- changes in the numbers of people going at different times of day;
- several quotes from interviews, focus groups or diaries that show that this was a problem and how people felt about this;
- a poem or creative writing that might also highlight the issues; or
- a photograph or a collage the group may have made on community and personal safety.

When you have made sense of your information, try out different ways of presenting your material. Consider this work early on, and share out tasks. Look again at the sample plan → **p20**, and remember that you may not want, or be able, to include all the material you have collected in each method of presentation.

Questions to ask when making sense of the information include the following.

- Did you meet your aims and objectives? If not, why not? Did they change, and if so why? Don't forget that change can be for the best and you can learn a lot from changing aims, objectives and, as a result, activities.
- Was the monitoring and evaluation work worthwhile? What has the group achieved by doing this?

- What method or methods of collecting information worked well, and what methods were not so good?
- What resources did you use, and did they work well?
- What needs to happen next? Do you need to write up a report and make presentations? You now need to plan for that work.
- Overall, did the monitoring and evaluation plans work? If you could start again tomorrow, would you use the same approach to planning and ways of collecting information?

Looking back to where you have travelled from

How far have we come? Reviewing your work

We strongly recommend you to review your monitoring and evaluation regularly. Stop every now and again and ask if you are on track with your plans (see **The sample plan** p20). Will the information you are collecting help you to answer the question 'how are we doing?'

- Identify other areas of information you still need to consider.
- Assess and change practices and activities, as a result of considering current findings from the information.
- Do you need to change what you are doing or find specialist advice?

You might choose to have reviews every three months.
You should invite everyone concerned with the project to a meeting to:

- reflect on what has happened up to now;
- describe what information has been collected;
- decide what that information is telling you so far about what you have achieved;
- consider any advice and support you may need; and
- help set out future plans.

It may be useful to bring in a facilitator (a person outside the project) who could help identify new or unresolved issues for the project to consider (see the section **Useful groups and publications** p91).

Be flexible and record what went wrong as well as what went well. You may need to change your plans and there may be barriers to your work that you could not have planned for, for example, a local venue closing down in which you had organised a community meeting, changes in project staff, or changes in funding.

When you are looking back, remember the importance of the information which is being regularly collected in your everyday work. You will also have minutes of meetings, previous reports on the history of the group, and outputs from activities (for example, paintings, crafts, short reports), which are also useful.

Revise your plan and set a date to review monitoring and evaluation work in the coming months. Reviewing your evaluation work can confirm your project plans or bring about change that is based on evidence and learning – so you can be confident that your project and evaluation work is helping to shape everyday and longer-term planning and activities.

Reaching your destination

Presenting your findings and letting people know about them

Having reached your aims, you will want to share your work and outputs with other people. You may also need to give feedback to your funding body or management committee.

Sharing your work with the people taking part and with other projects

How you tell other people about your findings will depend on the purpose of the evaluation, why it was done, and what it found. You can use the report as an internal document for group members and staff, and distribute it to funders and other groups in the community. You may want to publicise your findings more widely, using the media or a community event, or by holding an exhibition. It may be that some of your findings will be useful to specialist publications, where your experience is more widely published and helps to inform other projects and future policy.

Collages, photographs, videos, poems and creative writing can be powerful in presentations and bring alive the work of the project. But you will need to provide basic information on your project as well. Look at the section **Basic information to collect** p57.

The final report

You may want to write a final report. Your funding body may also need this as a condition of your grant award. Producing a written report is only one way of sharing your information with members and other groups or organisations. But it is an important way of recording information and assessing your project work for funders and for informing future activities.

If you are thinking of writing a final report, you should plan well ahead. The most difficult part is getting started so allow time for planning how you will write it up, including a first and a final draft. You might choose to use different types of information, for example, to provide a written report and a video or photographs. If you have reviewed information at regular intervals, you can look back at these reviews as a basis for writing your report before all the information is analysed.

The general section headings of a final report should have been agreed at the planning stage in the early months of the project. If headings are agreed, it makes it easier to get started on writing.

Remember, there are a number of ways you can present your findings and match information to the needs of funding bodies or management committees.

As a guide a report should include the following.

- Acknowledgements to the people who have helped and supported the project and the evaluation work.
- The aim and purpose of the report – why such an evaluation has been carried out.
- What you hoped to achieve with the project and the evaluation.
- The background of the project. Why and how you chose your aims and objectives.
- Who was involved in the evaluation and what methods you used.

- What you did. How you made sense of the information you collected and what you have learned. How things changed and why? How did the group come to their conclusions on the information? Did you all agree or were some people not so sure? If so, give a full explanation. It is likely that people will have a range of views on what the information is saying.
- A discussion of your findings (this will be invaluable to other people).
- Your recommendations. What you have found out which is useful for the project, your organisation or other groups, and, based on the evaluation material, what do you think should happen in the future?
- A summary and conclusion.

Set yourself deadlines, and write regularly. Try to create a 'rhythm of work' and keep the momentum going. Leave space for revising the report and let people know what you have to do to complete the report – ask them not to distract you. But don't write too much! People are very busy and not many have time to read long reports.

Try to present information in the most positive way, and to stress the achievements of the project. However, it is useful (as learning for you and other people) to note what did not go so well and why, and how these matters might be improved in the future.

Other travel information

Other issues to consider

At various points in this pack, we have talked about areas of evaluation which need people's permission to go ahead. For example, permission to be interviewed. These issues come under the heading of ethics.

Ethics refers to the way in which decisions are made about the evaluation and should involve negotiations between everybody involved. It is important to respect the rights of other people to be treated fairly and respectfully when they are involved in project and evaluation work. Look at the report **Right on Target** in the section **Useful groups and publications** p91.

It is important to remember people's right to confidentiality, and that everyone should give informed permission when getting involved in all the ways of collecting information listed in this pack. Taking part in the evaluation process can add to learning, widen experience and give groups and individuals extra power, but people may also need to be protected from unnecessary and unwanted intrusion. Everyone involved in the evaluation process has the right to be treated with equal respect.

Data protection

If you are collecting information on people, you also need to know about the **Data Protection Act 1998**. Get specialist advice from your local authority or library. Useful books include **Data Protection for Voluntary Organisations** by Paula Ticher and published in 2000 by the Directory of Social Change, **What's on My Record?** and **Protecting Personal Privacy: Guidelines for Collecting and Using People's Personal Data** both published by the Scottish Consumer Council (see **Useful groups and publications** p91).

The project's responsibilities when handling data under the Act can be summed up in one sentence: **Personal data will be processed fairly**.

'Personal data' covers identifiable, living individuals (known as the 'data subjects') which is held on computer or in many manual filing systems. The Act applies where information about specific individuals could be traced and retrieved, although personal data processed by an individual for domestic use (for example, your Christmas card list) is not covered. There are some specified exemptions but these are limited.

'Information' includes photographs, audio and video material, and biometric data like fingerprints, iris patterns (from the eye) or DNA samples! Under the Data Protection Act, anyone who handles personal data must do so fairly and responsibly.

Your responsibilities can be summarised as follows.

- To only hold information that you have a good reason for holding and that you genuinely need, and not to hold information that is not necessary.
- Certain types of 'sensitive' information concerning ethnic backgrounds, political or religious beliefs, health, sexuality, or criminal convictions carry added restrictions. These are outlined in the publication **Data Protection for Voluntary Organisations**. Most equal opportunities monitoring is not covered by the Data Protection Act. You can safely use information if the data subject has given you permission to use it, or if they have deliberately made that information public (for example, by standing as a representative for a political party).

- To only use it for the purpose you collected it for. This generally means that the person you are collecting information about should know who is collecting and processing the information and why.
- To process it in ways that meet the legislation – for example, the person must not be harmed by how you use their information (for example, if you published their home address on your website) and you should not pass information to anybody else without the person's permission.
- The person has a right to view the information you are holding about them, and to have their information removed from any lists or databases that are used for direct marketing.
- To make sure that as far as possible the information held is accurate, is up to date, is kept secure, and is deleted when no longer needed.

The information given in this publication about data protection is meant only for general guidance and, although we believe it is correct at the time of going to press, we recommend that you get advice about your responsibilities under the Data Protection Act. Please get specialist advice. A useful website is www.dataprotection.gov.uk

Copyright

Copyright means that the author of a piece of writing, artwork or music has automatic legal protection from someone copying their work.

You can buy CDs that are not covered by copyright law.

Copyright law prevents you from:

- making money from someone else's work;
- changing someone else's work (including translating it); or
- copying it in whole or part unless you have the author's or copyright holder's permission to do so.

There are exceptions.

- If you are using the work for research or private study.
- If you are reviewing the work and the source is acknowledged.
- For news reporting, although this does not include photographs.
- By law, it is not legal to copy an entire short work without permission, for example, a poem, newspaper article or photograph. But it is generally accepted that you can take one copy for use in your research. There are legal penalties for breaking copyright law

- you can find more information on this from the UK Copyright Service. Their website is: www.copyrightservice.co.uk

Human rights

The Human Rights Act which was introduced in October 2000 gives 'public authorities' new responsibilities. UK citizens can now enforce their rights under the European Convention on Human Rights (ECHR), in UK courts. To make sure your group or organisation is meeting conditions in the Act, it is important you get specialist advice. You can find out more about the Act from the Scottish Human Rights Trust (see **Useful groups and publications** p91).

The weather takes a turn for the worse! Remember your umbrella

Avoiding pitfalls

While you will have planned and carried out your evaluation with support and advice, you can still run into problems.

Throughout this pack, we have pointed you to some of the problems you may find with evaluation, and here we provide a checklist of these. This is not a full list and you may come across other problems. But if you are aware of the problems listed below, it may help you to avoid them, or at least to recognise them and sort them out.

- Make sure you have the appropriate skills to carry out the various types of monitoring and evaluation you want to do. If not, get help and support from other people.
- Allow enough time for preparing the evaluation, for collecting information, and for writing up and presenting material.
- Give key tasks to particular people, with appropriate backup, and set a timetable.
- Consider building relationships with other people who may help you.
- Remember that people can move on to other places or jobs so record work as you go along and review evaluation information regularly.
- Sometimes people do not get on and this can affect the project and evaluation work.
- Decide whether you can afford to carry out some evaluation methods – making videos can be expensive.
- Don’t be afraid to make changes or go back to some things if the review process highlights the need to do so. Make sure you write up these changes, and use them as a good learning experience in the final report.

Remember to value your monitoring and evaluation work. This work will help to inform your planning and review of the project more generally, and help with your future work. The group can develop new skills and, through the evaluation work, get to know each other much better.

More information

1 Glossary

This glossary is included to help explain some of the terms commonly used in evaluation documents and reports.

Action research

This is research that aims to contribute to the knowledge of a subject or issue as well as solve a particular problem. Information is generated by the ongoing research and this is fed back to the facilitators, people taking part and other relevant people to review and re-assess the project.

Aims

Aims are statements outlining what the group or organisation is trying to do. For example, an aim might be ‘to set up a health advice service for young people living in our area’.

Audit

An audit is an investigation to compare practice with set and agreed standards.

Brainstorm

To brainstorm is to ask a group of people to think about and share knowledge, ideas and information on a topic or idea. For example, how might we plan a group session on drug misuse? The group might start by writing up a flip chart on what they mean by drug misuse. What groups or individuals might be involved in drug misuse and why? What is the legal position? What groups can offer support and advice? Who might provide information or input to the group session? The group will give you a number of ideas and thoughts, and considering these can form the basis for planning the session and making sure relevant groups and services are involved.

Community development

Community development is about working with people in ways which help them to have greater influence over the decisions and processes which affect their lives, and help them come together to work out solutions to common problems.

Community planning

Every local authority has been asked to write a community plan to develop coordinated services for local needs. The planning processes involve community groups, voluntary groups, statutory departments and agencies, and considers issues such as employment and lifelong learning, housing and the environment and social and health care.

Community profiling

Developing a profile of your community involves finding out about the people who live there (age, sex, housing, employment) and the different groups, agencies and services that work in your area. Useful publications include the **Community Profile Resource Pack** produced by the Scottish Poverty Information Unit (www.spiu.ac.uk) and the profiles for electoral constituencies that are available on the website at www.show.scot.nhs.uk.phis/constituencyprofiles. (See **Useful groups and publications** **p91**.)

Dissemination

Dissemination involves sharing learning you have gained from your work with other initiatives, organisations and groups. This may take place using a range of methods (presentations, reports, collages, and so on), with different people and groups such as funders or a nearby community group, and be used for a number of outcomes, for example, to explore a particular way of working or to support applications for more funding.

Economy, effectiveness and efficiency

To explain these terms, we can ask the following questions.

Economy – Can the initiative, project or intervention be run in a way that provides the same level and quality of service, but at less cost, by another group or organisation?

Effectiveness – Has the initiative or project done what it said it would do?

Efficiency – Is the initiative, project or intervention organised in a way that makes the best possible use of all the resources?

Evaluation

Evaluation is a process which tries to judge the worth of an activity or plan by measuring it against specific conditions and standards.

It may be useful to know the difference between **formative evaluation**, **process evaluation**, **summative evaluation** and **outcome** or **impact evaluation**.

Formative evaluation gives information to people who are able to make changes to an activity, project or intervention so they can make improvements. The information can be about outcomes, how the service has developed and how the service operates.

Process evaluation focuses on the process. Unlike formative evaluations, process evaluations do not collect information about outcomes. The aim of this type of evaluation is to give people an understanding of how the activity, project or intervention operates. A process evaluation is useful for groups and organisations that are trying to repeat activities (for example, run a training workshop again) and can provide guidance for different projects in the future. For example, how you developed your aims and objectives, how you reviewed these and how this changed your work.

Summative evaluation aims to give decision-makers an assessment on the effects and efficiency of an activity, project or intervention. The focus of a summative evaluation is on outputs, outcomes and on the resources used. For example, how you assessed whether you had achieved what you said you would do.

Outcome or **impact evaluation** concentrates on discovering the outcomes or wider impact of an activity, project or intervention. An outcome or impact evaluation would be part of a summative evaluation and may be part of a formative evaluation but would not be part of a process evaluation.

If you want to know about these issues, you need to get advice on these approaches. Remember that collecting information is important. If you need to place your monitoring and evaluation work in one or more of these approaches, get advice early on from funding organisations or specialist sources such as the English, Scottish or Welsh Councils for Voluntary-sector

Organisations, the Voluntary Activity Unit, Northern Ireland and the Health Education Board for Scotland. (See **Useful groups and publications** p91.)

Facilitator

A facilitator is a person who makes opportunities available for everyone in a group or activity to take part and have their say.

Indicators

These are measures that record progress towards particular objectives. While process indicators would collect data on how the work is carried out, impact indicators collect data on the immediate effect of the work on its target group.

Inputs

These are the resources put into an organisation, project or initiative. Inputs include money (from grants, fees and donations), practical resources (for example, buildings, equipment, transport, facilities) and people's time and skills (paid staff and volunteers).

Monitoring

This involves regularly checking the progress of an organisation, initiative, project or intervention against a plan, by collecting information.

Objectives

These are statements about what the group or organisation wants to achieve by a particular date. If the aim is 'to set up a health advice service for young people (aged between 16 and 24) living in our area', objectives could include:

- publishing a list of local, relevant groups in the community;
- publishing a list of local social and health services;

- carrying out a needs assessment with young people;
- setting up a planning group;
- developing appropriate services; and
- monitoring, reviewing and evaluating the project work.

Outputs

An output describes what an organisation, project or initiative does. For example the number of people taking part in and completing a training course, a video, a training pack, or an advice and counselling service.

Outcomes

Outcomes describe the impact of what the organisation, project or initiative has done, for example, changes in behaviour such as giving up smoking or taking up sport. Outcomes are much harder to accurately measure because it is sometimes difficult to work out that an output was directly responsible for a particular outcome. Sometimes we separate impact from outcome and use impact to describe the short-term results and outcome to describe the long-term results.

Also we often talk about unplanned outcomes. These are outcomes we did not think about at the start of the work and, though they are often called ‘side effects’, they may be as significant or valuable as those intended outcomes.

Peer-review

A peer-review is often carried out before an article or resource goes to print. People with a particular expertise or knowledge of the subject are invited to comment critically on the content of an article or resource.

Performance indicator

A performance indicator is a specific measure used in a planned way to record one area of performance. Performance indicators should:

- relate to a specific activity or function of the group or organisation;
- be easy to measure;
- be capable of being controlled or improved; and
- relate to the aims and objectives of the work, group or organisation.

Pre-test

A pre-test involves asking people to comment on the early drafts of a resource.

Process

Process describes how the inputs are used. For example it describes how the money is used to fund a range of activities.

Qualitative approach

A qualitative approach to evaluation involves examining the qualities of an organisation, project or initiative. To do this, non-numerical information is collected, for example, the thoughts and reflections of members, volunteers and workers.

Quantitative approach

A quantitative approach to evaluation will use numbers and statistics to compare the outcomes of an organisation, project or initiative.

Semi-structured interview

This refers to interviews when the interviewer works with a basic list of questions but is able to vary these in the light of answers from the person they are interviewing. Also the interviewer may decide to add new questions, again in the light of what has been said and the topic or project under consideration.

Stakeholders

This is a term to describe the people who have a direct interest in an initiative, project or intervention. They usually include service users or potential service users, staff (paid workers and volunteers), the local community, managers, politicians, health researchers and the media.

Sustainability

When we talk about sustainability, we are often asking the following questions.

- Has the organisation, project or initiative achieved long-term benefits?
- Has the organisation, project or initiative had a long-term impact on the attitudes and behaviour of those taking part in the work?
- Are there structures (for example, staffing and other resources, communication networks) still in place and thriving after the work has been completed and the original funding has been spent?
- Has the organisation, project or initiative tackled the underlying cause of the problem?
- Is there a future for the initiative, project or intervention?

2 Evaluation questions

These questions are just a guide and not all may be relevant to your project.

The original idea

- How did the idea for the project come about?
- Who developed that idea and why?
- Was the project part of the ongoing work or interest of the group, worker or organisation?
- How does it fit into the existing role of the group, or worker or organisation?
- What was the background of the individuals (including workers), the group or organisation in relation to the proposed work of the project?
- Does the organisation have a policy or policies which are relevant to this work (for example, an alcohol policy)? How does the work fit into these policies?

The proposal

- What was originally proposed in the application for funding?
- Who wrote the original proposal and how did they go about this (for example, was there a consultation process with other people in the project or outside the project)?
- Was the proposal and the actual project based on any particular beliefs, views or knowledge of similar work?
- How did the proposal develop (highlighting any direction and content changes)?
- If changes did happen, why was this and what were the implications?

A description of the initiative

Aims, approach and methods

- What did the group hope to achieve?
- Were there any organisational aims? If so, what were these?
- How did the group or organisation define success?
- What approach and methods were used in the project?
- Why were these approaches and methods used?
- Where did the work of the project take place and why?

Difficulties, change and review

- What were some of the difficulties and learning experiences?
- What solutions were used to overcome any difficulties?
- What other issues were tackled?
- How were groups and organisations involved in planning and running the projects?
- Was there a regular review of content, methods and recording? If so, how often did the review take place and what process was used?
- How does the project link in with other local services and projects, if at all?

Participants (people taking part)

Direct participants (those who took part regularly)

- Who was involved and why? Were there any conditions for membership?
- How did the participants gain access to the project?
- What methods were used to recruit participants?
- What is the history of the people in the group?
- How were the participants involved in developing the project?

- Did the membership change during the life of the project. If so, why?
- How involved did the members get? Did this change? If so, why? Did members develop a sense of ownership for the project and take over certain areas of running and organising the project?
- Who did not take part and why? (This will be based on speculation but is still useful.)

Indirect participants (other people in the project or organisation)

- Who were these and how were they involved in the project, if at all?
- Did you expect there would be indirect participants and why?
- What were the benefits, if any, for these people?

Facilitators and volunteers

- Who were they and how did they get involved?
- What were their roles and responsibilities within the project (including financial management, recording, planning and running the project)?
- Did their responsibilities and roles change during the period of funding? If so, why?
- How were responsibilities within the facilitators' group shared out?
- What support did they receive to do the work? Who gave them this support?
- What was their previous experience of the issues and people taking part?

Recording methods

- Were these outlined in the proposal and how were they chosen?
- Was what happened different to what was originally planned? If yes, why?
- Who collected the data? What methods were used to collect data and analyse it?
- When was the information collected and why?
- What were the reflections of the members, the group, and organisations on the project as it progressed?
- Did the methods of collecting data work and were they appropriate?
- Who wrote the final report? How were decisions made on what to put into the report and what to leave out?
- Did the evaluation process meet the expectations of those involved?
- How much did the recording and evaluation work cost?

Funding

- How was the project funded and for how long?
- What was the actual spending compared with the proposed spending in the application for funding?
- Were the original costs in the proposal realistic?
- Did the funding help or restrict the development of the project?
- Do you plan to get more funding to continue the work? If yes, where from?
- Did the group or organisation receive other financial help or in-kind support? If yes, where from?

Outcomes

- What were the outcomes for:
  a the participants?
  b the facilitators?
  c the groups or organisations?
- How were these assessed against the original ‘definitions’ of success and expectations of the work?
- What were the main learning outcomes?
- What about outcomes or side effects or spin-offs that you had not planned for?
- What didn’t work? How did you recognise that? Did that information cause you to change the work of the project? If so, how?
- What have been the major changes in the quality of life for the people involved in the organisation and the community?
- Were there any outputs?

Sharing your learning (dissemination)

- How was the learning disseminated (shared)?
- Have you assessed the impact of this and, if so, what was the impact of the dissemination work?

3 Useful groups and publications

Groups and organisations

ASH (Action on Smoking and Health) **Scotland** campaigns for effective tobacco control legislation and to raise awareness about the harmful effects of using tobacco. ASH Scotland also plays an important role in developing project work. ASH Scotland works in partnership with a range of organisations, including other public health agencies and voluntary organisations and produces a range of reports and information materials. ASH Scotland commissioned this pack to support the evaluation of community work. The development work came from two programmes of their work – Women, Low Income and Smoking and Tobacco and Inequalities. You can contact them at: 8 Frederick Street, Edinburgh, EH2 2HB. Phone: 0131 225 4725
Fax: 0131 220 6604 E-mail: ashscotland@ashscotland.org.uk
Website: www.ashscotland.org.uk

Charities Evaluation Service (CES) aims to help projects be more confident, effective and efficient by showing the benefits users get from evaluation. It also aims to develop skills. The approach of CES is to listen carefully to the needs of the project and provide clear and practical advice, plans and reports in a supportive and friendly manner. You can contact them at : 4 Coldbath Square, London, EC1R 5HL.
Phone: 020 7713 5722 Fax: 020 7713 5692
E-mail: enquiries@ces-vol.org.uk
Website: www.ces-vol.org.uk

Community Evaluation Northern Ireland (CENI), was set up in 1995 as an independent, not-for-profit organisation. It provides evaluation services to the voluntary and community sector. Before this, CENI existed as a branch of Charities Evaluation Services UK (1991 to 1995). CENI is in the voluntary sector and has a mission to strengthen and improve the sector through a better understanding and use of evaluation. It provides a range of services including: advice; external evaluation; training; and support. You can contact them at: 295 Ormeau Road, Belfast, BT7 3GG.
Phone: 028 9064 6355 Fax: 028 9064 1118
Website: www.ceni.org

The Community Development and Health Network (CDHN) is a voluntary membership organisation which is committed to promoting and supporting community action on health issues. The Community Development and Health Network understands that the main factors affecting health are poverty, unemployment, inequality and discrimination. The Community Development and Health Network aims for change at policy, organisational and practice level to promote and support community activity on health issues and work for action to ease the effects of poverty and inequalities in health. One of its aims is to help develop, use and understand tools for action in support of community development and health practice. You can contact them at: 30a Mill Street, Newry, Co Down, BT34 1EY.
Phone: 028 3026 4606 Fax: 028 3026 4626
E-mail: cdn.ni@btinternet.com Website: www.cdhn.org

Community Health Exchange (CHEX) provides support for projects and communities developing work based on the principles of community development. CHEX provides support in developing good practice, influencing policies on inequalities in health, networking with other projects, developing communication between projects and policy makers, and assessing training and development. It publishes a newsletter every three months. You can contact them at: CHEX, c/o Scottish Community Development Centre, Suite 329, Baltic Chambers, 50 Wellington Street, Glasgow, G2 6HJ. Phone: 0141 248 1990 Fax: 0141 248 4938 E-mail: chex@cdf.org.uk

Community Health UK (CHUK) is a charitable organisation working to deal with inequalities in health by supporting development in community health work. CHUK publishes a journal that aims to share learning and ideas on community health work. You can contact them at: Community Base, 113 Queens Road, Brighton, BN1 3XG.
Phone: 01273 234868 Fax: 01273 234869
E-mail: mail@chuk.org Website: www.chuk.org

Health Education Board for Scotland (HEBS) is the national organisation in Scotland responsible for promoting and developing good practice in health promotion. They have a useful Research Centre website where you can find information on evaluation in the HEBS Toolbox. You can contact them at: Woodburn House, Canaan Lane, Edinburgh, EH10 4SG. Phone: 0131 536 5500
Fax: 0131 536 5503 Website: www.hebs.com

National Council for Voluntary Organisations (NCVO) aims to give a shared voice to voluntary organisations, providing leadership in tackling new issues and unmet needs. They also aim to support the development of voluntary organisations helping them to achieve the highest standards of practice and effectiveness. You can contact them at: Regents Wharf, 8 All Saints Street, London, N1 9RL.
Phone: 0207 713 61661 Fax: 020 713 6300
E-mail: ncvo@ncvo-vol.org.uk
Website: www.ncvo-vol.org.uk

Public Health Institute of Scotland (PHIS) aims to increase the effectiveness of public health activities. On their website you can access health reports for each electoral constituency in Scotland. These reports are useful for community profiling and planning project proposals and activities. You can contact them at: Clifton House, Clifton Place, Glasgow, G3 7LS. Phone: 0141 300 1010
Fax: 0141 330 1020 E-mail: info@phis.csa.scot.nhs.uk
Website: www.scot.nhs.uk/phis

Scottish Community Development Centre (SCDC) is a partnership between the Community Development Foundation and the University of Glasgow. It promotes and supports best practice in community development and has carried out development and dissemination work on evaluation. You can contact them at: Suite 329, Baltic Chambers, 50 Wellington Street, Glasgow, G2 6HJ.
Phone: 0141 248 1924 Fax: 0141 248 4938
E-mail: scdc@cdf.org.uk Website: www.scdc.org.uk

Scottish Council for Voluntary Organisations (SCVO) is an umbrella organisation for voluntary-sector groups in Scotland. It provides training, advice and general support to voluntary-sector groups. They have three offices:
Head Office, 18/19 Claremont Crescent, Edinburgh, EH7 4QD. Phone: 0131 556 3882 Fax: 0131 556 0279.
West of Scotland Office, Third Floor, Centrum Building, 38 Queen Street, Glasgow, G1 3DX.
Phone: 0141 221 0030 Fax: 0141 248 8066.
North of Scotland Office,
9 Ardross Terrace, Inverness, IV3 5NQ. Phone: 01463 235633
Fax: 01463 716003 Website: www.scvo.org.uk

Scottish Human Rights Centre aims to promote human rights in Scotland by carrying out public education, research, scrutiny of legislation and monitoring how international human rights treaties are being followed in Scotland. You can contact them at: 146 Holland Street, Glasgow, G2 4NG.
Phone 0141 332 5960 Fax 0141 332 5309
E-mail: shrc@dial.pipex.com

Scottish Human Rights Trust aims to disseminate information and provide education on human rights in Scotland. Their activities include seminars, conferences, training and publications. You can contact them at:
146 Holland Street, Glasgow, G2 4NG.
Phone 0141 332 5960 Fax 0141 332 5309
E-mail: contactus@scotrights.org
Website: www.scotrights.org

UK Evaluation Society (UKES) brings together all those involved in evaluation work to exchange information and learning through meetings, seminars, conferences and their website. You can contact them at: UKES, PO Box 5356, Brentwood, CM14 4ZJ. E-mail: info@evaluation.or.uk
Website: www.evaluation.org.uk

UK Public Health Association (UKPHA) focuses on inequalities in health and on promoting long-term development and environmental and social regeneration to improve people's health and wellbeing. You can contact them at: 30 Great Peter Street, Trevelyan House, London, SW19 2HW. Phone: 0870 0101932 Fax: 0207 4138909
E-mail: bookings@ukpha.org.uk
Website: www.ukpha.org.uk

Voluntary Activity Unit, Department of Health and Social Services, Northern Ireland. This government department provides support and advice on voluntary-sector work and volunteering. You can contact them at: Voluntary Activity Unit, Department of Health and Social Services, Dundonald House, Upper Newtownards Road, Belfast, BT4 3SF. Phone 01232 524992 Fax: 02890 569327
E-mail: vau@dsdni.gov.uk Website: www.dsdni.gov.uk/vau

Welsh Council for Voluntary Action (WCVA) represents and campaigns for the voluntary sector organisations, volunteers and communities in Wales. They provide advice, information and training, and lobby decision-makers at all levels. You can contact them at: Baltic House, Mount Stuart Square, Cardiff, CF10 5TH.
Phone: 029 204 31700 Fax: 029 204 31701
E-mail: enquiries@wcva.org.uk Website: www.wcva.org.uk

Useful Publications

Where we have quoted a cost this is for guidance only and was correct at the time of publication (January 2002).

An Evaluation Resource for Healthy Living Centres. Jane Meyrick and Paige Sinkler, Health Education Authority, 1998. Produced by a consortium group, with support from the national agencies for health promotion in the UK. It provides an overview of evaluation for those involved in community development health projects such as Healthy Living Centres. There is an emphasis on research methods such as questionnaires and interviews, with less attention to more innovative ways of recording information such as photographs and collages. You can get the pack from the publications department of the Health Development Agency at: Trevelyan House, 30 Great Peter Street, London, SW1P 2HW. Phone: 020 7222 5300 Fax: 020 7413 8900 E-mail: hda.enquirydesk@had-online.org.uk Website: www.had-online.org.uk This resource costs less than £25.

The Big Picture. Scottish Council for Voluntary Organisations. This is a framework to help voluntary organisations improve the quality of their work. The pack aims to help organisations assess their strengths and plan, carry out and review improvements. You can have a preview of the pack on the website at www.scvo.org.uk You can also contact them at: SCVO Head Office, 18/19 Claremont Crescent, Edinburgh, EH7 4QD. Phone: 0131 556 3882 Fax: 0131 556 0279. The pack costs less than £50 for voluntary organisations and less than £70 for non-voluntary organisations.

Community Profile Resource Pack. Scottish Poverty Information Unit. Glasgow Caledonian University, 1998, second edition. This pack contains four booklets. One is a guide on how to produce a community profile and comes with a set of community profile cards to help groups organise their information. There are two examples of profiles. The final booklet gives information on campaigning skills and comes with a set of cards to help groups record and store useful information. You can order the pack from: Scottish Poverty Information Unit, Glasgow Caledonian University, Park Campus, Glasgow, G3 1LP.
E-mail: spiu@gcal.ac.uk Website: www.spiu.gcal.ac.uk
The pack costs £10. The ISBN is 0 948355 19 6.

Data Protection for Voluntary Organisations. Paul Ticher, 2000. This is a practical guide to the 1998 Data Protection Act, with advice on handling personal information on computer and on paper. The book gives helpful examples, model statements and action points. You can order the book from: The Directory of Social Change, 24 Stephenson Way, London, NW1 2DP. Phone: 020 7209 5151
E-mail: info@dsc.org.uk The ISBN is 1 900360 47 0 and the book costs less than £15.

Do your own Research Project – A Guide for First-time Researchers in Education and Social Science. Judith Bell. Open University Press, 1999, third edition. This book might sound a bit grand, but it is very useful for examples of searching and recording information, keeping records, questionnaires and surveys, interviews, and case studies.

It also considers ethics, presenting information and writing a report. To order this book you can e-mail Open University Press at enquiries@openup.co.uk and quote the ISBN number 0 335 20388 4. This book costs less than £15.

Effective Interventions Unit, Evaluation Guides, 2001/2. These guides are easy to follow, and deal with definitions, planning, methods and writing up reports. They are provided to support drug action teams and agencies to assess what is effective and to evaluate their work, but they could be used by any project interested in evaluation. You can download the guides from the website or order them in an A4 size, ring-binder format from the unit at the Scottish Executive. You can contact them at: Effective Interventions Unit, Substance Misuse Division, St Andrew's House, Edinburgh, EH1 3DG. E-mail: EIU@scotland.gsi.gov.uk Website: www.drugmisuse.isdscotland.org

Evaluation Handbook for Health Action Zone Funded Interventions in Merseyside. This handbook is written for those involved in evaluating the Merseyside Health Action Zone funded projects. It is relevant to everyone working on the evaluation of health projects based upon theories of change. Key to the approach of the Merseyside Health Action Zone is: evaluation as a process of learning and reflection; participation by all involved at various levels of activities; a concern for issues around inequality and disadvantage; using new methods; and sharing learning in a way that promotes improvements to work, policy and planning. The project also runs evaluation workshops (there is a charge for these). You can get the handbook free from Merseyside Health Action Zone Team on 0151 285 2421. Website: www.mhaz.org.uk

Health Issues in the Community. A Community Development Approach. Jane Jones, Health Education Board for Scotland, second edition, 2002. This is a training pack about community development. It covers learning objectives to help people to explore and review health in society, to encourage people to think about health and the causes of ill health, and to introduce key ideas in community development and health. The pack is in an A4-size ring binder, and you can get it from the publications section of the Health Education Board for Scotland at:
Woodburn House, Canaan Lane, Edinburgh, EH10 4SG.
Phone: 0131 536 5500 Fax: 0131 536 5503
E-mail: publications@hebs.scot.nhs.uk

Help! I need to design a questionnaire! This is a useful, short, easy-to-read document on the basics of designing and using questionnaires. You can get it from: Health Promotion Department, Lanarkshire Health Board, Strathclyde Hospital, Airbles Road, Motherwell, ML1 3BW. Phone 01698 266242.

Learning Evaluation and Planning (LEAP) Framework. This is a handbook for partners in community learning. It gives a lot of useful information on planning (but you will need some knowledge of planning and evaluation) and there is limited information on collecting information. You can get

this handbook from: Scottish Community Development Centre, Suite 329, Baltic Chambers, 50 Wellington Street, Glasgow, G2 6HJ. Phone: 0141 248 1924
Fax: 0141 248 4938 E-mail: scdc@cdf.org.uk
Website: www.scdc.org.uk The framework pack costs around £20.

Measuring Community Development in Northern Ireland – A Handbook for Practitioners. Voluntary Activity Unit, DHSS, Northern Ireland, 1996. The handbook is about how to measure progress in community development. **Monitoring and Evaluation of Community Development in Northern Ireland.** Voluntary Activity Unit DHSS, Northern Ireland, 1996. This report describes a model for evaluation in community development. These reports detail a model for evaluation that has been designed to be used flexibly by community development projects. You can order the reports from: Department of Health and Social Services, Dundonald House, Upper Newtownards Road, Belfast, BT4 3SF.
Phone 01232 524992. Each report costs less than £15.

Monitoring and Evaluation Made Easy – A Handbook for Voluntary Organisations. Anne Connor, Edinburgh HMSO, 1993. An easy-to-read handbook for people in voluntary organisations who want to describe, review and plan their activities. It has some useful information on putting monitoring and evaluation into practice. It gives examples throughout the book of how to do this. You can

order this book from: The Stationery Office,
71 Lothian Road, Edinburgh, EH3 9AZ.
Phone 0131 228 4181. The ISBN number is 0 11 494229 3.
The book costs less than £15.

Practical Guidance on Evaluating Health Promotion. Jane Springett, Liverpool John Moores University, Liverpool. This is aimed at health promotion projects and considers why projects should carry out an evaluation. It gives details of how to do it, with guidance on each stage of the process. You can get the report from: Institute for Health, Liverpool John Moores University, 79 Tithebarn Street, Liverpool, L2 2ET. Price: £2 for postage. You can also get a copy from K.J.Hughes@livjm.ac.uk

Practical Tools and Evaluation Pack. This is a useful pack that contains information on useful tools for research and doing an evaluation. The two booklets are easy to read with sections giving examples on planning and record-keeping as well as case studies of different areas of evaluation.
You can get it from: Unemployed Voluntary Action Fund, Comely Park House, 80 New Row, Dunfermline, Fife, KY12 7EJ. Phone: 01383 620780. The pack costs less than £10.

Researching Social Life. Edited by Nigel Gilbert, Sage Publications, 2001, second edition. This book is a good beginner's guide to research and gives information and examples of a wide range of methods. It also considers ethics and writing up research. You can order it from the website at www.sagepub.co.uk The ISBN number is 0 7619 7244 7, and the book costs less than £20.

Right On Target – Monitoring and Evaluating Community Health Projects. Lothian Community Health Projects' Forum, 2000. This booklet helps projects to develop a framework for evaluating community health projects, which could be agreed both by the projects and the organisations that fund them. It aims to be a 'how-to' guide to evaluation and is written in an easy-to-read style with useful explanations of key terms and ideas. You can order the booklet from: Lothian Community Health Projects Forum, 4 Duncan Place, Edinburgh, EH6 8HW.
Phone: 0131 555 6035 E-mail: lhpforum@aol.com

Tools of the Trade. Published by Community Development and Health Network Northern Ireland. The Community Development and Health Toolkit is aimed mainly at those coming from a range of backgrounds in the health and social services, as well as from the community and voluntary sectors who use Community Development approaches for improving the health of their communities. The Toolkit suggests ways of responding to common problems and aims to guide you towards sources of information that will help you focus your practice. The Toolkit adopts a broad definition of health, which recognises that people's health is affected by their social, economic and environmental experience, as well as by individual factors, and that Community Development methods are appropriate for dealing with these social determinants of health.
ISBN 1-903591-00-7. You can get it from: 30a Mill Street, Newry, Co Down, BT34 1EY. Phone: 028 3026 4606
Fax: 028 3026 4626 E-mail: cdn.ni@btinternet.com
Website: www.cdhn.org Prices: £15 member,
£30 community volunteer, £35 non-member.

What's On Record? and **Protecting Personal Privacy: Guidelines for Collecting and Using People's Personal Data. What's On Record?** is free of charge and is a practical guide to our right to access information on health, education, housing, social work, credit references and medical records. **Protecting Personal Privacy: Guidelines for Collecting and Using People's Personal Data** costs £14.50 and is a guide for those who collect information on other people. You can get both guides from:
Scottish Consumer Council, Royal Exchange House,
100 Queen Street, Glasgow, G1 3DN.
Phone: 0141 226 5261 Fax: 0141 221 0731
Website: www.scotconsumer.org.uk