



The CES resource guide:
evaluating outcomes and impact

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Introduction

The CES Resource Guide: Evaluating outcomes and impact was originally compiled by Jean Ellis, Tracey Gregory and Avan Wadia in 2007. The guide was originally the *Monitoring and evaluation resource guide* developed as part of wider research on monitoring and evaluation in the third sector funded by City Bridge Trust and the Performance Hub.

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Guides to monitoring and evaluation

Title	Monitoring and Evaluation in Context
Developed by	Plymouth Monitoring and Evaluation Development Group (PMEDG)
Year published	2005
Developed for	Groups and individuals who are relatively new to monitoring and evaluation activities
Available from	Plymouth Monitoring and Evaluation Development Group (PMEDG)
Price	Free to download from the Plymouth City Council website
Approach	Self-evaluation
Practical tools	No
Use of case examples	A fictional project is used to help illustrate and explain key terms and methods used.
Lists additional resources	Yes
Size	16 pages
Description	A short, simple guide to understanding the links between monitoring and evaluation, why they are important, how to plan your monitoring and evaluation, ethics and data protection. It provides a useful glossary, references and further reading.

Title	Using ICT to Improve your Monitoring and Evaluation: a workbook to help you develop an effective ICT system
Developed by	Written by Dr Simon Davey, Diana Parkinson and Avan Wadia for the Performance Hub at Charities Evaluation Services
Year published	2008
Developed for	Anyone wishing to develop an effective ICT system to improve their monitoring and evaluation
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	ICT and monitoring and evaluation
Practical tools	Tips for every step
Use of case examples	Yes
Lists additional resources	Glossary and checklist plus an example evaluation framework and a worksheet on the different options available to groups and organisations
Size	86 pages
Description	<p>This is very useful workbook to support developing an ICT system for monitoring and evaluation by using the 17 steps described, covering issues to consider before developing an ICT system.</p> <p>There is a help and support section at the end that includes further reading, sources of advice and other help.</p>

Title	Monitoring and evaluation
Developed by	Voluntary Action Sheffield (VAS)
Year published	No date found
Developed for	Voluntary and community organisations
Available from	Voluntary Action Sheffield
Price	Free to download from the Voluntary Action Sheffield website
Approach	A brief introduction to monitoring and evaluation
Practical tools	No
Use of case examples	One example
Lists additional resources	Useful publications
Size	10 pages
Description	<p>A VAS information sheet covering:</p> <ul style="list-style-type: none"> • what is monitoring and evaluation? • the benefits and cycle of monitoring and evaluation • a case study • useful publications.

Title	First steps in Monitoring and Evaluation
Developed by	Charities Evaluation Services
Year published	2002
Developed for	Charities and community organisations that are looking at monitoring and evaluation for the first time
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Self-evaluation and a general introduction and guide to evaluation
Practical tools	Checklists for each step in the evaluation process
Use of case examples	A case study of a family centre is used throughout the guide.
Lists additional resources	Other CES publications are listed.
Size	25 pages
Description	This guide provides a practical, five-step approach to monitoring and evaluating your own project or organisation.

Title	Practical Monitoring and Evaluation: a guide for voluntary organisations (3rd edition)
Developed by	Jean Ellis for Charities Evaluation Services
Year published	2008 (3rd edition)
Developed for	The full range of voluntary and community organisations, from small community-based projects to large organisations, providing a complex range of services at a number of sites.
Available from	Charities Evaluation Services
Price	Available from the Charities Evaluation Services website
Approach	Covers both self-evaluation and external evaluation
Practical tools	The final section of the guide is a practical toolkit providing tips and templates for analysing data and data collection tools. A useful glossary is also included at the end.
Use of case examples	Examples of different organisations are used throughout to illustrate the points and use of the tools.
Lists additional resources	Two pages of suggested further reading
Size	135 pages
Description	<p>This comprehensive guide is written in accessible plain English and focuses throughout on what is practical.</p> <p>It covers:</p> <ul style="list-style-type: none"> • introduction to terminology • introduction to basic concepts and theory • tools for project management, from needs analysis and planning through to review, but focusing on evaluation • practical advice on where to go for further guidance on the various steps, methods, etc. <p>It demonstrates the CES Planning Triangle as a tool for setting aims, objectives, outputs, outcomes and impacts and illustrates how to develop an evaluation framework.</p> <p>The guide works through the cycle of planning, monitoring, evaluation and utilisation of findings. The text is divided into basic and further information and is designed to be accessible to organisations that are new to monitoring and evaluation as well as those that already have basic systems in place.</p>

Title	Evaluation Resource Pack
Developed by	Jane Thompson for Paul Hamlyn Foundation, in association with the National Institute of Adult Continuing Education
Year published	2007
Developed for	Front-line workers and volunteers in the voluntary and community sector
Available from	The Paul Hamlyn Foundation
Price	Free to download from The Paul Hamlyn Foundation website
Approach	Self-evaluation with an emphasis on participatory methods
Practical tools	The pack focuses on tools for planning, recording and assessing a project.
Use of case examples	Some example tools are provided from the contributing projects.
Lists additional resources	No
Size	85 pages
Description	This is a very easy to use pack, designed to introduce groups to the process of evaluation and report writing. It provides key points about core evaluation research methods, and focuses particularly on creative methods for collecting evidence.

Title	A Funder's Guide to Evaluation: leveraging evaluation to improve non-profit effectiveness
Developed by	Peter York for Fieldstone Alliance in collaboration with Grantmakers for Effective Organisations, USA
Year published	2005
Developed for	Grantmakers in the United States
Available from	Fieldstone Alliance
Price	Available from the Fieldstone Alliance website
Approach	Focus on evaluative learning as a means of increasing non-profit effectiveness
Practical tools	Appendices contain some worksheets and assessment tools, eg, a funder readiness tool and a logic model development tool.
Use of case examples	Limited
Lists additional resources	No
Size	127 pages
Description	<p>This book discusses the use of evaluation as a capacity-building tool within the context of US non-profit organisations, inviting non-profits to focus on learning to improve, rather than to prove results.</p> <p>It considers what is evaluated, who is involved and how funders can work together with external evaluators and grantees to develop learning.</p> <p>The book advocates a pragmatic approach to gathering information and its basic principles could be applied within a UK setting.</p>

Title	LEAP: A manual for Learning Evaluation and Planning in Community Learning and Development
Developed by	Alan Barr for the Community Development Foundation
Year published	2002
Developed for	The LEAP framework is used for planning and evaluating community learning activity throughout Scotland. It will be equally of value to organisations or community projects wishing to establish a structured and focused approach to planning and evaluating their work.
Available from	The Scottish Government hosts the manual, and more information on the range of LEAP tools is available from The Scottish Community Development Centre .
Price	The manual is free to download from the Scottish Government website. All other information is available from The Scottish Community Development Centre website.
Approach	Framework for planning evaluation
Practical tools	Yes
Use of case examples	The Leap resources section of the website provides detailed case studies of the application of the framework to volunteer centres in Scotland. There are also a number of detailed case studies of the application of the framework to different types of individual community organisations. Further details from the individual case study organisations, such as plans and outcomes, can be found on the case study section of the website.
Lists additional resources	Not found
Size	76 pages

Continued on next page

Description	<p>Many resources have been developed to support people using LEAP, some of which are listed below, with further information to be found on the Scottish Community Development Centre website.</p> <p>LEAP: A Manual for Learning Evaluation and Planning in Community Learning and Development (2008): This manual sets LEAP in the context of current policy and practice and is published by the Scottish Government.</p> <p>LEAP Step-By-Step: An Introductory Guide to the LEAP Framework (second edition, 2007): This brief guide explains what LEAP is, how it works and why planning and evaluation go hand-in-hand.</p> <p>LEAP Learning Object: The Learning Object is a multi-media learning tool to support good practice in community engagement and development work.</p> <p>Greenspace LEAP (2005): This handbook outlines the LEAP approach and its application for Greenspace work, including guidance on planning outcomes and on developing outcome indicators.</p> <p>LEAP for Health (2003): This resource is for use by those involved in promoting health and wellbeing in community settings. It is designed to assist projects and programmes that focus on enabling people to develop and maintain their health on a day-to-day basis through individual and community action.</p> <p>LEAP for Volunteering (2003): Developed by SCDC, it has a specific focus on volunteering, its values, methods and objectives. This version of the LEAP framework can be applied to the work of the wide range of agencies working in the voluntary sector.</p>
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Title	The Evidence Guide
Developed by	Barnardo's
Year published	2006
Developed for	Social care professionals
Available from	Barnardo's
Price	Available from the Barnardo's website
Approach	Outcomes and general evaluation; evidence-based research
Practical tools	Sample session plans, activities and handouts
Use of case examples	No
Lists additional resources	Some references provided
Size	n/a
Description	<p>This pack contains five modules:</p> <ul style="list-style-type: none"> • Using research evidence in practice: an introduction • Locating research evidence in five steps • Appraising and reviewing research evidence • Adapting and applying evidence: issues for individual practitioners and organisations • Outcome-focused evaluation. <p>Each module is designed to be worked individually and includes a learner's pack and a trainer's pack.</p> <p>The learner's packs use individual activities, review questions and key message boxes to facilitate interactive, self-guided learning.</p> <p>The trainer's packs contain session plans, learning outcomes and group activities as well as a CD of handouts and slides for running a training course.</p>

Title	A little book of evaluation
Developed by	Connexions Service National Unit. Published by the Department for Education and Skills
Year published	2001
Developed for	The book was originally designed to support Connexions' project managers, but it contains general information on evaluation applicable to other contexts as well.
Available from	Prove and Improve
Price	Free to download from the Prove and Improve website
Approach	Self-evaluation and a general introduction to monitoring and evaluation
Practical tools	Practical tips on planning an evaluation and an example evaluation plan and timetable; advantages and disadvantages of different information gathering methods such as questionnaires, interviews, focus groups; also on reporting and disseminating findings
Use of case examples	Case studies of the Connexions pilots are used to illustrate different points.
Lists additional resources	References and a bibliography are provided
Size	40 pages
Description	<p>This booklet provides a useful overview of the issues and a framework to enable project managers and practitioners to evaluate and assess their work effectively.</p> <p>It provides practical guidance to encourage thinking about what works and what doesn't, and to explore the questions:</p> <ul style="list-style-type: none"> • Where am I now? • What do I want to achieve?

Title	Evaluating community projects: a practical guide
Developed by	Marilyn Taylor, Derrick Purdue, Mandy Wilson and Pete Wilde for the Joseph Rowntree Foundation
Year published	2005
Developed for	Initially developed for the 20 community or voluntary organisations taking part in the JRF Neighbourhood Programme to evaluate their work. However, this guide may also be of interest to other voluntary and community organisations looking for an introduction to evaluation.
Available from	Joseph Rowntree Foundation
Price	Free to download from the Joseph Rowntree Foundation website
Approach	Self-evaluation, and a general introduction and guide to evaluation
Practical tools	The guide includes a menu of information gathering methods, a table for reviewing your project (complete with example) and a table for planning your evaluation.
Use of case examples	Provides suggested examples of issues Joseph Rowntree Foundation Neighbourhood Programme organisations might consider
Lists additional resources	No
Size	12 pages
Description	This booklet provides a short introduction to evaluation and presents five steps to follow when evaluating a community project.

Title	Next Steps: Monitoring and Evaluation on a Shoestring
Developed by	Sally Cupitt and Jean Ellis for Charities Evaluation Services
Year published	2011
Developed for	Trustees, staff and volunteers of third sector organisations
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Self-evaluation and data collection guidelines
Practical tools	A data collection section illustrates tools which can be used to collect data, including the Helix Arts observation tool.
Use of case examples	A number of projects have been used to illustrate concepts in the document.
Lists additional resources	A list of references for further reading is available.
Size	52 pages
Description	<p>This booklet is for those organisations wishing to think further about developing the extent and quality of their monitoring and evaluation practice.</p> <p>The guide covers the following subject areas:</p> <ul style="list-style-type: none"> • getting ready for monitoring and evaluation • understanding evaluation terms • identifying your outputs and outcomes • identifying what data to collect • good practice in collecting data • how to collect data • using your data.

Title	Does Your Money Make a Difference? (Second edition)
Developed by	Jean Ellis with Milla Gregor for Charities Evaluation Services
Year published	2010
Developed for	Funders of all types, including those commissioning through contract arrangements or through grants, including charitable trusts and foundations, philanthropists, local authorities, private sector organisations, central government departments, non-departmental public bodies
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Monitoring and evaluating funding
Practical tools	No
Use of case examples	Real projects are used to illustrate principles and good practice
Lists additional resources	Includes further resources and tools to improve monitoring and evaluation and ultimately the effectiveness of funding
Size	48 pages
Description	<p>This booklet has been refocused to outline the principles that are of common relevance to funders of all types, including those commissioning through contract arrangements or through grants. This guide describes principles and good practice in monitoring and evaluation by funders.</p> <p>It contains:</p> <ul style="list-style-type: none"> • reasons for monitoring and evaluating funding • key features influencing the way in which funders monitor and evaluate • a description of good practice, together with case studies • an overview of 'intelligent funding' • different ways that monitoring and evaluation of funding can increase learning and development • a matrix indicating appropriate levels of monitoring and evaluation. <p>The appendices contain a brief description of evaluation types and a model of good practice for grant making organisations.</p>

Discussion papers and guidance documents

Title	Readability: how to produce clear written materials for a range of readers
Developed by	NIACE
Year published	First published in 2005. Revised in 2009.
Developed for	Anyone interested in presenting written information clearly
Available from	NIACE
Price	Free to download from the NIACE website
Approach	None
Practical tools	No
Use of case examples	No
Lists additional resources	No
Size	12 pages
Description	Although not strictly about monitoring and evaluation, this leaflet may be helpful when writing an evaluation report. This leaflet outlines the principles that will help you to present written texts clearly, taking account of the needs of your readers.

Title	Good practice guide: user involvement
Developed by	Big Lottery Fund
Year published	2008
Developed for	Voluntary and community projects
Available from	Big Lottery Fund
Price	Free to download from The Big Lottery Fund website
Approach	User involvement approaches in achieving intended outcomes
Practical tools	No
Use of case examples	Yes
Lists additional resources	Further guidance at the end
Size	4 pages
Description	The good practice guide is based on evaluation findings from the Big Lottery Fund evaluation of the legacy Research Grants programme. The guides cover good practice in relation to user involvement, partnership working and dissemination.

Title	Evaluation discussion papers
Developed by	Charities Evaluation Service
Year published	1998-2005
Developed for	Voluntary and community organisations
Available from	Charities Evaluation Services
Price	Available on the Charities Evaluation Services website
Approach	Useful for self-evaluation and external evaluation
Practical tools	Practical examples, real life case studies, checklists and ideas
Use of case examples	Case examples are used in each paper to illustrate the topic and use of approaches.
Lists additional resources	Each paper has useful references.
Size	8-12 pages
Description	<p>A series of papers introducing and discussing the following evaluation topics:</p> <p>Paper 1 – The purpose of evaluation</p> <p>Paper 2 – Different ways of seeing evaluation</p> <p>Paper 3 – Self-evaluation</p> <p>Paper 4 – Involving service users in evaluation</p> <p>Paper 5 – Performance indicators: use and misuse</p> <p>Paper 6 – Using evaluation to explore policy</p> <p>Paper 7 – Outcome monitoring</p> <p>Paper 8 – Benchmarking in the voluntary sector</p> <p>Paper 9 – Assessing impact</p>

Title	Guidance papers
Developed by	Charities Evaluation Services
Year published	2004 and 2005
Developed for	Voluntary and community organisations
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Guidance on commissioning an evaluation
Practical tools	Guidance paper 1 gives an example costing of an external evaluation.
Use of case examples	n/a
Lists additional resources	n/a
Size	5-7 pages
Description	<p>Guidance paper 1: How much should we expect to pay for an external evaluation?</p> <p>This paper sets out the type of costs that need to be considered when commissioning an external evaluation. It suggests the range of daily rates you might expect to pay for evaluation; survey work or data input.</p> <p>Guidance Paper 2: What to include in an evaluation brief</p> <p>The paper identifies a number of things to think about before starting to write the brief and provides information on suggested content of the brief.</p> <p>Guidance paper 3: Key terms and definitions</p> <p>This is a guide to some of the key terms that voluntary organisations will come across when dealing with issues of monitoring, evaluation and quality assurance. It is a list of basic technical terms that are commonly used in voluntary sector management.</p>

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Implementing an outcomes approach

Title	Investing in Outcomes: supporting funded projects to record and report on outcomes (pilot report)
Developed by	Voluntary Action Fund (VAF)
Year published	2007
Developed for	Those interested in setting and reporting outcomes in a funding context
Available from	Scotland Funders Forum
Price	Free to download from the Scotland Funders Forum website
Approach	Outcomes monitoring
Practical tools	No
Use of case examples	No
Lists additional resources	No
Size	13 pages
Description	<p>This report is based on the Outcomes Monitoring Pilot project which provided bespoke training and support to funded projects. It explores the barriers to recording and reporting outcomes in voluntary organisations.</p> <p>An Outcome Monitoring Pilot project was set up providing bespoke training and support to a group of funded projects to test how best to support funded organisations in improving their recording and reporting on outcomes.</p>

Title	Big Lottery Fund Guide to Outcomes
Developed by	Big Lottery Fund
Year published	2012
Developed for	Voluntary and community projects
Available from	Big Lottery Fund
Price	Free to download from the Big Lottery Fund website
Approach	Self-evaluation
Practical tools	No
Use of case examples	Examples throughout
Lists additional resources	No
Size	16 pages
Description	This guide is a summarised version of material on the Big Lottery Fund website. It provides a simple step-by-step introduction to the concepts and principles of an outcomes approach.

Title	Your Project and its Outcomes
Developed by	Sally Cupitt with Jean Ellis for Charities Evaluation Services
Year published	2007
Developed for	All voluntary and community organisations, particularly those new to outcomes
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website. Hard copies can also be purchased via the Charities Evaluation Services website.
Approach	Monitoring outcomes
Practical tools	Includes a number of tools and exercises to help identify outcomes and indicators and to assess achievement.
Use of case examples	Case examples are used throughout to demonstrate the different stages of the process. These include a women's project, a training service, a local infrastructure organisation, a legal service and a community-building project. It contains examples of how to use the CES Planning Triangle as the basis for setting outcomes and indicators.
Lists additional resources	Sources of help, further reading and a glossary are included.
Size	23 pages
Description	This guide is divided into three chapters: <ul style="list-style-type: none"> • understanding outcomes • identifying and assessing outcomes • using outcomes information.

Title	The Case for an Outcomes Focus
Developed by	Jean Ellis for Charities Evaluation Services
Year published	2009
Developed for	Third sector organisations
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Describes the drive and case for an outcomes monitoring approach by third sector organisations
Practical tools	No
Use of case examples	Real-life projects are discussed within the various sub-sections of the document.
Lists additional resources	Useful publications and reports are referenced.
Size	14 pages
Description	<p>This paper places the adoption of an outcomes approach by third sector organisations within its wider context, and reviews some of the findings on the value to be obtained from an outcomes focus.</p> <p>It considers how identifying appropriate and relevant outcomes, collecting relevant data, analysing and reporting it, can provide an essential and welcome focus on end benefits and users and prompt a reappraisal or redefinition of organisational or project aims.</p>

Title	Making a Difference Together? Planning, monitoring and evaluating voluntary and community sector collaborative working
Developed by	Peter Williams for Charities Evaluation Services
Year published	2010
Developed for	Managers and leaders in voluntary and community organisations as well as beginners and those experienced in programme evaluation
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Collaborative monitoring and evaluation within the voluntary and community sector
Practical tools	CES Planning Triangle and the SWOT analysis
Use of case examples	Illustrative examples are used throughout the document.
Lists additional resources	Provides a link to other online resources and case studies
Size	56 pages
Description	<p>This publication aims to help in planning the measurement of positive and negative outcomes and how to reach conclusions on the likely or actual benefits of collaboration. A five-stage sequence is used as a guide on collaboration with other VCOs. They are how to:</p> <ul style="list-style-type: none"> • prepare • engage • plan together • monitor • evaluate. <p>The appendix provides a compilation of some real-life case studies about collaborations between VCOs. The case studies describe the project and the collaboration process, and reflect on what has been learnt.</p>

Analysing outcomes information

Title	Analyzing Outcome Information: Getting the most from data
Developed by	Harry P. Hatry, Jake Cowan, Michael Hendricks, as part of The Urban Institute's Series on Outcome Management for Non-profit Organisations
Year published	2004
Developed for	Both large and small nonprofit organisations
Available from	The Urban Institute
Price	Free to download from The Urban Institute website
Approach	Analysing outcomes data
Practical tools	The guide is full of sample data tables and reports.
Use of case examples	No
Lists additional resources	No, but this is part of a series on outcome management for nonprofit organisations. Other guide topics include: <ul style="list-style-type: none"> • key steps in outcome management • surveying clients • using outcome management • following up with former clients • developing community-wide indicators.
Size	36 pages
Description	This is an invaluable guide to those new to data analysis. It takes the reader from the basics of analysing change scores (outcome from baseline) and averages, to comparing outcomes with targets, and cross-tabulation to look at outcomes related to particular characteristics. The text is accompanied by sample tables demonstrating how data can be analysed and reported.

Outcome indicators

Title	Outcome and Outcome Indicator Banks: Availability and use
Developed by	Avan Wadia and Diana Parkinson for Charities Evaluation Services
Year published	2011
Developed for	Organisations struggling to identify and measure the outcomes of their work. Funders and the organisations who need to develop outcome indicators.
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Outcome indicators
Practical tools	No
Use of case examples	A link to Charities Evaluation Services 15 case studies, illustrating aims, objectives, outcomes, outputs and indicators for a range of different organisations
Lists additional resources	Details of other resources relevant to the development and use of outcome and outcome indicators are given.
Size	29 pages
Description	<p>The main body of the report describes the 15 resource banks identified. It gives details of each resource bank:</p> <ul style="list-style-type: none"> • what it is and who it is relevant for • how it was developed • how it works and how it is being used • what it can offer voluntary and community organisations • what plans there are to develop it further • where it can be found. <p>The document also provides information on work in progress as well as details of where to find other resources relevant to the development and use of outcome and outcome indicators. The appendix provides a bank of indicators sorted by sector or area of service provision.</p>

Title	Keeping on Track: A guide to setting and using indicators
Developed by	Diana Parkinson and Avan Wadia for the Performance Hub
Year published	2008
Developed for	Third sector organisations to help improve their skills in setting output, outcome and process indicators
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Use of indicators in monitoring and evaluation
Practical tools	No
Use of case examples	A number of different case examples are used.
Lists additional resources	The guide includes a further reading list with links to relevant websites and documents, and details of further sources of support.
Size	66 pages
Description	<p>This booklet provides a step-by-step guide to setting and using indicators. It aims to help you:</p> <ul style="list-style-type: none"> • increase your understanding of how to develop indicators • look at how you then gather information on these indicators • make use of the information you gather. <p>The guidance is illustrated by good-practice case studies, and takes account of what funders and commissioners regard as good quality indicators. It also offers practical guidance on how to set and use indicators that will help you to monitor your work effectively.</p>

Quality of life outcomes

Title	Well-being Evaluation Tools: A Research and Development Project for the Big Lottery Fund (final report)
Developed by	Saamah Abdallah, Nicola Steuer, Nic Marks, Nicky Page (nef)
Year published	May 2008
Developed for	Big Lottery Fund projects and other voluntary and community organisations
Available from	Big Lottery Fund
Price	Free to download from the Big Lottery Fund website
Approach	Introduction to Big Lottery Fund well-being evaluation tools
Practical tools	Well-being evaluation tools
Use of case examples	No
Lists additional resources	References section at the end lists books and useful websites
Size	47 pages
Description	This report describes the research and development of a set of evaluation tools to be used by Big Lottery Fund grants that are working towards improving healthy eating, mental health and levels of physical activity of beneficiaries.

Title	Prove It! Measuring the effect of neighbourhood renewal on local people
Developed by	New Economics Foundation for Groundwork and Barclays plc
Year published	2000
Developed for	Community regeneration projects, but would also be useful for all organisations seeking to measure the effect of their work on building social capital
Available from	New Economics Foundation
Price	Free to download from the New Economics Foundation website
Approach	Participatory approach to measuring outcomes and social capital for small-scale projects
Practical tools	Useful tools and easy-to-use exercises for developing indicators
Use of case examples	Barclays' SiteSaver projects are presented as an example of how the approach can work.
Lists additional resources	No
Size	130 pages
Description	This handbook describes a method for measuring the effect of community projects on local people and on the relationships between them and on their quality of life. The method involves local people in both choosing the indicators and collecting data. It was tested in 16 areas of the country as part of Groundwork's Barclays SiteSavers programme.

Soft outcomes and distance travelled

Title	SOUL Record (Soft outcomes universal learning)
Developed by	The Research Centre, City College Norwich
Year published	2006
Developed for	The Norfolk voluntary and community sector to evidence the progression of their clients in relation to informal learning
Available from	The Research Centre
Price	Available from The SOUL Record website
Approach	Outcomes monitoring
Practical tools	Includes a selection of questionnaires, worksheets and observation sheets
Use of case examples	n/a
Lists additional resources	n/a
Size	n/a
Description	<p>The SOUL Project grew out of a need identified by the Norfolk voluntary and community sector to evidence the progression of their clients in relation to informal learning. This is learning which does not lead to a recognised qualification and takes place in a wide variety of settings.</p> <p>A group of voluntary organisations in Norfolk took the initiative of devising a research project with The Research Centre, City College Norwich, to achieve a number of objectives, one of which was the development of a system to monitor and measure progression in 'soft' outcomes.</p>

Title	Guide to measuring soft outcomes and distance travelled
Developed by	Sara Dewson, Judith Eccles, Nii Djan Tackey, Annabel Jackson for the Institute of Employment Studies (iES)
Year published	2000
Developed for	Organisations running projects under the ESF Objective 3 programme and particularly those in Policy Field 2 (equal opportunities for all and promoting social inclusion). In addition, it will be of interest to other projects and organisations working with ESF target groups (primarily those people who are some distance from labour market participation).
Available from	Department for Work and Pensions
Price	Free to download from the Department for Work and Pensions website
Approach	Measuring soft outcomes
Practical tools	No
Use of case examples	Example outcomes and indicators are illustrated for different target groups
Lists additional resources	No
Size	23 pages
Description	A basic guide that defines the term 'soft outcomes' and presents different methods for recording and measuring soft outcomes and distance travelled.

Title	A practical guide to measuring soft outcomes and distance travelled
Developed by	Welsh European Funding Office
Year published	2003
Developed for	Projects funded by the European Social Fund
Available from	Network for Europe
Price	Free to download from the Network For Europe website
Approach	Soft outcome measure
Practical tools	Outlines tools from a number of different approaches to measuring soft outcomes
Use of case examples	Examples of how different organisations have used and developed tools to measure soft outcomes
Lists additional resources	
Size	86 pages
Description	<p>This guide is based on systems developed and used by projects to measure soft outcomes, and is written for project workers either developing and introducing a system from scratch, or looking for ideas on how to improve their existing approach.</p> <p>It explains the main components of measurement systems, and provides practical, step-by-step guidance to developing an approach that best fits the needs of individual projects. The guide also includes an annex providing information and sample documentation from ten different organisations.</p> <p>The different approaches used by these organisations to measure soft outcomes and distance travelled could be adapted for use by other organisations.</p> <p>Each approach is summarised, identifying the key features and includes copies of forms, indicators and other visual aids used. They range from personal profile questionnaires and weekly appraisal forms to task achievement wheels and a race track progression tool.</p>

Title	Bridges to Independence
Developed by	Bridges Project
Year published	First published 2001. Revised in 2007
Developed for	<p>The guide and toolkit were conceived and initially developed by Bridges Project and then further refined in conjunction with Aberdeen Cyrenians and the National Schizophrenia Fellowship Scotland.</p> <p>The model has been piloted by nine organisations and found to be useful both in social care settings and in prevocational programmes. The former have tended to focus on self-reliance and the latter on employability.</p>
Available from	Bridges Project
Price	Free to download from the Bridges Project website
Approach	Measuring soft outcomes
Practical tools	Practical tools are provided throughout, for example, the Record of Evidence, a sample Individual Action Plan and the Summary Record of Progress
Use of case examples	Examples of how all the tools have been used by organisations are provided
Lists additional resources	
Size	137 pages in total. The toolkit is also available in 3 sections.
Description	<p>Bridges to Independence has been developed by Bridges Project as a tool for practitioners to assist clients in identifying and monitoring their progress towards achieving the skills required for independent living and self-reliance. Although primarily designed for staff working with young people, it lends itself to other beneficiary groups in a range of settings.</p> <p>Bridges to Independence can be used as a complete soft measurement package or as a set of stand alone tools which workers can use and adapt to their professional environment. It is based on the very successful Bridges to Employability. Bridges to Independence is lengthy as it incorporates guidance, exhaustive check-lists and templates.</p>

Title	The Evelyn Oldfield Unit's Community Impact Toolkit 2011-2012
Developed by	The Evelyn Oldfield Unit
Year published	2011
Developed for	Refugee and migrant community organisations to capture their outcomes and impact
Available from	Evelyn Oldfield Unit
Price	Free to download from the Evelyn Oldfield Unit website
Approach	Impact measurement
Practical tools	Planning Triangle, Outcomes Star, sample questionnaire forms, Charities Evaluation Matrix and examples of participatory methods used in evaluations
Use of case examples	Resource Centre monitoring and evaluation procedures has been used to illustrate the procedures used when conducting evaluation
Lists additional resources	A list of other websites for support and advice is provided
Size	41 pages
Description	<p>The toolkit is in two parts: the diagnostic toolkit is an excel-based tool to assess how effective you are at measuring your work; the second part provides data capture tools, including questionnaires, volunteer impact survey, outcome stars, focus groups and case studies.</p> <p>The toolkit also provides a sample of different assessment forms that can be used in evaluation monitoring.</p>

Title	Assessing Change: Developing and using outcomes monitoring tools
Developed by	Diana Parkinson and Avan Wadia for Charities Evaluation Services
Year published	2010
Developed for	Voluntary sector organisations
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Outcomes monitoring
Practical tools	Examples of questionnaires, observation record sheets, focus group guide and staff outcomes monitoring form
Use of case examples	No
Lists additional resources	The guide gives information on websites to access off-the-shelf outcomes monitoring tools and details of where to find further information and support.
Size	65 pages
Description	This guide is a practical handbook aimed at helping to identify and develop ways to collect information on outcomes. It provides a guide through planning outcome monitoring, selecting appropriate methods, developing tools, preparing and collecting the outcomes information.

Understanding and assessing impact

Title	Basic impact assessment at project level
Developed by	Colin Kirkpatrick and David Hulme for Enterprise Development Impact Assessment Information Service
Year published	No date found
Developed for	International development programmes and projects aimed at enterprise development
Available from	Prove and Improve website
Price	Free to download from the Prove and Improve website
Approach	Impact assessment
Practical tools	No
Use of case examples	No
Lists additional resources	No
Size	36 pages
Description	<p>This report examines the underlying principles and basic methods of assessing impact on development projects.</p> <p>The paper begins by outlining the principles of impact assessment and goes on to develop a framework for assessment at project level, and the practical application of this framework.</p> <p>This is followed by issues to be considered when commissioning and conducting an impact assessment, including items that should be included in drawing up 'terms of reference' for engagement of external consultants. It is written in a way that assumes previous experience in monitoring and evaluation.</p>

Title	Tell your story: community impact mapping
Developed by	Karen Byrne for the Development Trust Association (DTA)
Year published	2005
Developed for	Development Trusts, but could be used by any voluntary and community group as a participative tool to plan, monitor, review and evaluate projects and programmes
Available from	Development Trust Association
Price	Free to download from the Development Trust Association website; hard copies also available
Approach	Evidencing outcomes and short-term impacts through story telling
Practical tools	Ready to print worksheets with suggested questions and blank storyboards
Use of case examples	The following case study examples are used: <ul style="list-style-type: none"> • Hailsham Trust • Community Safety Centre • Account 3 women's co-operative • Market Rasen Development Trust.
Lists additional resources	
Size	16pp
Description	<p>This short guide aims to help you think about your story, why and how your organisation does what it does and the difference you are making to your community.</p> <p>It takes you through a process of asking questions and recording the responses on a storyboard to illustrate the journey taken and some of the outcomes and short-term impacts achieved.</p> <p>Although the title suggests it is about impact mapping it takes you through the first steps in identifying impacts and focuses on the outcomes your organisation is achieving.</p>

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Overview of evaluation methods

Title	A participatory model for evaluating social programs
Developed by	Written by Yeheskel 'Zeke' Hasenfeld, Katherine Hill and Dale Weaver for the James Irvine Foundation
Year published	No date found
Developed for	Non profit organisations and evaluators
Available from	The James Irvine Foundation
Price	Free to download from the James Irvine Foundation website
Approach	Participatory model of evaluation
Practical tools	12 principles of participatory model of evaluation included
Use of case examples	Two programs are used as examples
Lists additional resources	Suggested reading at the end
Size	27 pages
Description	This American publication is part case study and part instruction guide, describing a 'participatory' approach to evaluation, including the client in the design and implementation of the evaluation.

Title	Tools for development: a handbook for those engaged in development activity
Developed by	DFID
Year published	2003
Developed for	DFID officers and others involved in development activity
Available from	DFID
Price	Free to download from the DFID website
Approach	DFID's approach to development activity: how to apply the skills and techniques to every stage of the DFID Activity Cycle
Practical tools	Lots of tools and samples
Use of case examples	Examples from different countries
Lists additional resources	References and suggested reading and training and management resources at the end
Size	142 pages
Description	<p>Based on DFID's experiences and best practices, this resource book provides useful, practical tips on skills and techniques needed to deliver successful development activities and interventions. It is a manual from which to pick and choose skills and techniques.</p> <p>The manual covers skills and techniques for:</p> <ul style="list-style-type: none"> • stakeholder analysis • problem and situational analysis • visioning • logical frameworks • risk management • participatory methodologies and management • teamworking • influencing and negotiating • building partnerships • conflict reduction • monitoring, reviewing and evaluating.

Logic model and theory of change

Title	Logic model development guide
Developed by	W.K. Kellogg Foundation
Year published	Updated 2004
Developed for	
Available from	W.K. Kellogg Foundation
Price	Free to download from the W.K. Kellogg Foundation website
Approach	Logic Model
Practical tools	Materials include examples, exercises, checklists and templates
Use of case examples	Example case studies are included to illustrate points
Lists additional resources	An appendix at the back includes additional resources.
Size	72 pages
Description	<p>This guide defines the logic model, relating planned work to intended results. It makes the case for using logic models in planning and evaluation to build a theory of intermediate and ultimate long-term outcomes, how to achieve them and how to assess them.</p> <p>The guide demonstrates how basic logic models can be constructed, and how a 'Theory of Change Logic Model' can be developed for projects and for use in evaluation.</p>

Title	Developing a Logic Model
Developed by	University of Wisconsin-Extension, Cooperative Extension, Program Development and Evaluation.
Year published	No year found
Developed for	Individuals, teams, organisations and businesses
Available from	University of Wisconsin-Extension
Price	Free to download from the University of Wisconsin-Extension website
Approach	Logic model
Practical tools	The hierarchy of effects tool, logic models
Use of case examples	A number of case examples are used to illustrate inputs, outputs and outcomes within a logic model.
Lists additional resources	No
Size	86 slides
Description	A Powerpoint presentation indicating the definitions and principles of logic models, steps used in creation of logic models, benefits of the framework and associated everyday examples. It also addresses concerns over limitations of the use of a logic model and provides a caution list when implementing the model.

Title	Examples of Theories of Change
Developed by	DFID Evaluation Department
Year published	2012
Developed for	Donors, foundations and policy-level organisations and departments
Available from	DFID
Price	Free to download from the DFID website
Approach	Theory of change
Practical tools	The fellows' 'diamond' diagram, the ripples' 'diamond' diagram, along with samples of logic model diagrams
Use of case examples	Use of specific country programs to illustrate the Theory of Change
Lists additional resources	No
Size	55 pages
Description	<p>This document provides examples of theories of change of different types. They are presented as examples, not as templates. The range of examples represents how different groups have approached their theory of change thinking.</p> <p>The document provides a DFID checklist for theory of change for projects.</p>

Title	Developing a Theory of Change: A framework for accountability and learning for social change
Developed by	Keystone accountability
Year published	No year found
Developed for	Organisations to help identify how they contribute to broader change within a wider context, and how to plan and prioritise in order to make change happen
Available from	Keystone accountability
Price	Free to download from the Keystone accountability website
Approach	Theory of change
Practical tools	Illustrates workshop activities to develop a theory of change, including a 'vision of success', 'pathways of change' and developing indicators of success
Use of case examples	No
Lists additional resources	No
Size	24 pages
Description	This is a short practical guide to understanding and creating a theory of change. It discusses the benefits of the approach, how it differs from strategic planning and logic models, and illustrates activities to assist in developing a theory of change. The document also provides blank theory of change templates.

Title	Review of the use of 'Theory of Change' in International Development
Developed by	Isabel Vogel for the UK Department of International Development
Year published	2012
Developed for	DFID, to inform a more consistent approach within the organisation
Available from	DFID
Price	Free to download from the DFID website
Approach	Theory of change
Practical tools	Log-frames; Impact maps.
Use of case examples	Examples are provided from donors, implementing agencies and projects.
Lists additional resources	List of websites on evaluation
Size	86 pages
Description	<p>An introduction to theory of change for the international development sector, providing a brief history and overview of current use of the approach.</p> <p>The appendix lists theories of change for several projects and there are guidelines and tools to support people working with theory of change.</p>

Title	Mapping Change: Using a theory of change to guide planning and evaluation
Developed by	Anne Mackinnon and Natasha Amott for Grantcraft
Year published	2006
Developed for	Grant makers, grantees and theory of change consultants
Available from	Grantcraft
Price	Free to download from the Grantcraft website
Approach	Theory of change
Practical tools	A mini-case study illustrating theory of change as the basis for strategic planning
Use of case examples	The guide draws on the experiences of grantmakers, grantees, and consultants who have used theories of change to plan, guide and evaluate their work.
Lists additional resources	Some templates that grant makers or grantees may find helpful for creating their own theory of change or logic model. For further resources, readers are referred to the Grantcraft website.
Size	12 pages
Description	An introduction to theory of change and its benefits to the organisation. A mini-case study is described giving details of a specific project and how its theory of change was developed and used. The last section deals with common questions about theory of change.

Title	Making Connections: Using a theory of change to develop planning and evaluation
Developed by	Jean Ellis, Diana Parkinson and Avan Wadia for Charities Evaluation Services
Year published	2011
Developed for	Voluntary or community sector organisations wanting to bring about change – whether at an individual, organisation, community or policy level.
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Theory of change
Practical tools	CES Planning Triangle and visual maps building a theory of change
Use of case examples	Illustrative projects are used to demonstrate points and methods
Lists additional resources	A list of additional resources is provided
Size	48 pages
Description	<p>The document provides an overview of the theory of change approach and explains more about how the approach is used. It works through the several steps of developing a theory of change and discusses how to make it most useful. It provides details of how a theory of change can serve as a dynamic and comprehensive framework for evaluating projects and programmes.</p> <p>The guide illustrates the text by building a theory of change step-by-step for a fictitious project working with unemployed young people. It also provides links to a real-life example of theory of change developed by TB Alert and to a case example of an evaluation using the approach by the Chinese National Healthy Living Centre.</p>

Title	Theory of Change
Developed by	NPC
Year published	2012
Developed for	Third Sector organisations
Available from	NPC
Price	Free to download from the NPC website
Approach	Theory of change
Practical tools	A visual map building a theory of change
Use of case examples	No
Lists additional resources	Some additional resources listed
Size	12 pages
Description	This short paper introduces theory of change, explains the origins of the technique, and discusses how it can be used by charities to improve their work.

Title	The logic model handbook
Developed by	Valley of the Sun United Way, USA
Year published	2006
Developed for	Organisations applying for funding to Valley of the Sun United Way's Impact Agencies
Available from	Valley of the Sun United Way
Price	Free to download from the Valley of the Sun United Way website
Approach	Logic Model
Practical tools	Attachments include a glossary, questions to consider when creating a logic model and how to deal with specific problems with hard-to-measure outcomes
Use of case examples	Example outcomes and outcome indicators are provided.
Lists additional resources	Some mentioned
Size	43 pages
Description	<p>This handbook was developed as a technical tool for organisations applying to Valley of the Sun for funding and therefore uses the outcomes that the programmes set out to achieve. It provides a useful tool for completing a logic model, with a blank format provided.</p> <p>The handbook also provides guidance on how to complete sections on:</p> <ul style="list-style-type: none"> • goals • theory • target population • inputs • strategies • outputs and outcomes.

Title	Theory of Change
Developed by	ActKnowledge and the Aspen Institute Roundtable on Community Change
Year published	2003
Developed for	The Theory of Change online suite is a set of tools to aid social change initiatives in creating, sharing and using their theories.
Available from	Theory of Change Community
Price	Free to use Theory of Change Community website
Approach	Theory of Change
Practical tools	The suite provides in-depth tutorials, examples, and a forum for users to exchange information on Theory of Change.
Use of case examples	<p>'Project Superwomen' provides a 'guided' example, based on an evaluation of a collaborative project between a social service provider, a non-profit employment training centre and a domestic violence shelter.</p> <p>The example demonstrates how the project moved through the five steps of:</p> <ul style="list-style-type: none"> • identifying goals and assumptions • backwards mapping and connecting outcomes • developing indicators • identifying interventions and writing a narrative.
Lists additional resources	There is an online library and glossary
Size	n/a
Description	Theory of Change (TOC) is a tool for designing and evaluating social change. The site provides information on the development of TOC and the overview gives a very brief explanation of the key points.

Title	Logic Model Workbook
Developed by	Innovation Network
Year published	2005
Developed for	Users of the Point K Learning Center (Practical Tools for Planning, Evaluation, and Action), available on their website, and as supplement to training for US non-profit organisations, but can be used as a stand-alone guide.
Available from	Innovation Network
Price	Free to download from the Innovation Network website
Approach	Logic model
Practical tools	This workbook works in tandem with Innovation Network's Logic Model Builder as a tool to create a logic model online.
Use of case examples	No
Lists additional resources	No, but other resources are available on the Innovation Network website
Size	30 pages
Description	<p>This workbook demonstrates the role of the logic model, essentially a planning tool, in evaluation. It takes you step-by-step through the logic model components, demonstrating the distinction and the logical link between outputs and outcomes.</p> <p>The two appendices provide a logic model template and a worksheet demonstrating the chain between shorter-term outcomes, intermediate outcomes and longer-term outcomes.</p>

Participatory Appraisal

Title	Have you been PA'd?
Developed by	Oxfam Scotland
Year published	2003
Developed for	Professionals and practitioners, activists and campaigners, postgraduate, undergraduate, general and reference
Available from	Oxfam
Price	Free to download from the Oxfam website
Approach	Participatory appraisal
Practical tools	None
Use of case examples	Case studies used
Lists additional resources	Useful contacts and other publications listed at the back
Size	24 pages
Description	The report describes what participatory appraisal is and is not and what it can achieve. It uses examples from projects and by using the voices of those involved in the processes, demonstrates how PA can be used in community and agency decision-making. It also shows what was learned by the community, by the organisations involved, and by decision-makers.

Title	Tools Together Now: 100 participatory tools to mobilise communities for HIV/AIDS
Developed by	International HIV/AIDS Alliance
Year published	2006
Developed for	Any organisation working on HIV/AIDS, but particularly those working directly with communities affected by HIV/AIDS. The participatory tools can readily be adapted and applied to work in other areas.
Available from	International HIV/AIDS Alliance
Price	Free to download from the HIV/AIDS Alliance website
Approach	Participatory Learning and Action (PLA)
Practical tools	This resource contains 100 participatory tools, covering all aspects of working with communities affected by HIV/AIDS. Within that there are tools specific to evaluation processes.
Use of case examples	No
Lists additional resources	Very limited number of further HIV/AIDS specific resources signposted
Size	250 pages
Description	<p>This resource contains a wealth of participatory tools covering all aspects of working with communities affected by HIV/AIDS. Section C, which contains time analysis tools, is particularly relevant to evaluation. Other sections also provide tools that can be used for:</p> <ul style="list-style-type: none"> • information collection (Section D) • experiential tools (Section E) • prioritisation and quantification tools (Section F) • action planning tools (Section G). <p>There is also some useful material on working with participatory methods, and the tools themselves lend themselves quite easily to transfer into other areas of work.</p>

Outcome mapping

Title	The Challenges of Assessing Development Impacts
Developed by	Evaluation Unit, International Development Research Centre, Ottawa
Year published	No year found
Developed for	International development agencies
Available from	SWITCH
Price	Free to download from the SWITCH website
Approach	Outcome mapping
Practical tools	None
Use of case examples	None
Lists additional resources	No
Size	4 pages
Description	<p>This brief pamphlet outlines the outcomes mapping approach. This focuses on the changes in behaviour of individuals, groups and organisations with which the programme works directly, rather than attempting to measure broader development impacts.</p> <p>Although related to international development interventions, this approach can be applied to domestic projects and programmes.</p>

Title	Crouching Impact, Hidden Attribution: Overcoming Threats to Learning in Development Programs
Developed by	Terry Smutylo, Evaluation Unit, International Development Research Centre, Ottawa
Year published	2001
Developed for	International development agencies
Available from	Outcome Mapping learning community
Price	Free to download from the Outcome Mapping learning community website
Approach	Outcome mapping
Practical tools	None
Use of case examples	None
Lists additional resources	No
Size	29 pages
Description	<p>This discussion paper presents the paradox that the more successful a project, the more likely it is to work together with other agencies, and the more swiftly its direct influences would disappear.</p> <p>Following this, the author makes the case for an outcomes mapping approach rather than seeking to attribute longer-term and broader development impacts to a project's work. This paper provides a useful thinking tool when planning, designing and focusing evaluation.</p>

Social accounting and audit

Title	New Guide to Social Accounting and Audit
Developed by	Alan Kay (Social Audit Network)
Year published	First published 2005, revised in 2011
Developed for	Primarily for social enterprises and voluntary and community organisations
Available from	Social Audit Network
Price	Available from the Social Audit Network website
Approach	Social Audit for measuring performance, impact, social impact, environment impact, economic impact
Practical tools	Exercises, templates and sample questionnaires are included
Use of case examples	Examples are used throughout
Lists additional resources	Signposts to other resources are used throughout the manual
Size	
Description	<p>The new Guide aims to demystify and improve the process of social accounting and audit for all types and sizes of social economy organisations and to make links with the range of tools and frameworks which have been developed in recent years.</p> <p>The Guide will help you to:</p> <ul style="list-style-type: none"> • fully understand what your organisation does, who it works with and for (Step One) • understand how to collect relevant and useful information about what you do and the impact your organisation is having (Step Two) • report effectively on your organisation's performance and impact (Step Three) • have your report independently verified (audited) for accuracy and relevance (Step Four).

Social added value

Title	Making the case – social added value guide
Developed by	Forth Sector for Communities Scotland
Year published	2006
Developed for	The guide has been developed to assist social enterprises and voluntary organisations understand and identify social added value tools that would best suit them in securing investment or proving their impact from delivering public services.
Available from	Evaluation Support Scotland
Price	Free to download from the Evaluation Support Scotland website
Approach	Social audit for measuring added value of organisations
Practical tools	None
Use of case examples	Case studies used throughout the guide
Lists additional resources	Comprehensive list of resources and other support available. Also includes glossary of terms.
Size	64 pages
Description	<p>The guide is designed to support organisations working in the social economy to demonstrate the social added value that is intrinsic to services they deliver. Providing a recognised way to measure the positive benefits of these activities will help when seeking further and future investment.</p> <p>The publication has two introductory chapters, outlining what social added value is and why it should be measured, as well as looking at the environment in which social enterprises and voluntary organisations operate. It also provides an introduction to the various social added value tools that exist and is designed to help you choose the right tool to measure your social added value, and signpost you to sources of advice and support available.</p>

Title	Toolkit to measure the added value of voluntary and community based activity
Developed by	Department for Social Development (DSD)
Year published	2006
Developed for	This guide was produced in Northern Ireland to set out how to measure the added value of voluntary and community organisations.
Available from	Evaluation Support Scotland
Price	Free to download from the Evaluation Support Scotland website
Approach	Social audit for measuring added value of organisations
Practical tools	None
Use of case examples	Case studies used throughout the guide
Lists additional resources	Comprehensive list of resources and other support available. Also includes glossary of terms.
Size	24 pages
Description	<p>This guide sets out how to measure the added value of voluntary and community activity. It could be useful for local authorities, partnership agencies and other funders to review the impact of supporting voluntary agencies in geographic areas or in particular communities of interest.</p> <p>CVS' or other voluntary organisations may find it useful in setting the context for the funded activity or to relate evaluation data to the framework.</p>

Social return on investment

Title	A Guide to Social Return on Investment
Developed by	SROI Network. Written by Jeremy Nicholls, Eilis Lawlor, Eva Neizert and Tim Goodspeed, and edited by Sally Cupitt,
Year published	First published 2009, updated in 2012
Developed for	Anyone interested in SROI for the third sector. The purpose of the 2012 update was to amend the language used so that the guide is more relevant for international audiences and for different sectors and types of organisations.
Available from	The SROI Network
Price	Free to download from the SROI Network website
Approach	SROI is a framework for understanding, measuring and managing the outcomes of an organisation's activities. SROI can encompass all types of outcomes but stakeholders determine what outcomes are relevant. SROI values outcomes by using financial proxies, so that they can be added up and compared to the investment made, resulting in a ratio. For example, an organisation might have a ratio of £4 of social value created for every £1 spent on its activities.
Practical tools	An impact map is available free to go with the workbook. Online software is also available to SROI Network members (see SROI Network website for details).
Use of case examples	Some case examples, and a hypothetical worked example, are used as illustration
Lists additional resources	Lists details of where further information or support can be found
Size	Main body of document 78 pages; another 24 pages of additional resources.
Description	The workbook takes you through the six steps of an SROI: <ul style="list-style-type: none"> • establishing scope and identifying key stakeholders • mapping outcomes • evidencing outcomes and giving them a value • establishing impact • calculating the SROI • reporting, using and embedding.

Title	Social Return on Investment – An introduction
Developed by	The SROI Network for the Cabinet Office
Year published	2009
Developed for	Third sector organisations, government, funders, investors and commissioners to help account for their achievements and attract funding
Available from	The SROI Network
Price	Free to download from the SROI Network website
Approach	SROI
Practical tools	No
Use of case examples	SROI evaluations conducted in several projects are used to provide practical examples of the importance of the approach.
Lists additional resources	A range of useful websites are provided for extra support in SROI
Size	12 pages
Description	<p>The guide begins with a brief introduction to principles of SROI. It provides case examples of organisations which have carried out SROI on their projects and the results. Principles guiding the use of SROI are outlined. The development of SROI analysis has been broken down into six main stages to aid simplicity in carrying it out.</p> <p>To further aid understanding, a case example has been used to illustrate each stage of the process. The appendix provides a list of other resources relevant to SROI and for further reading.</p>

Title	Measuring Real Value: a DIY Guide to Social Return on Investment
Developed by	Ellis Lawlor, Eva Neizert and Jeremy Nicholls for new economics foundation
Year published	2008 (second edition)
Developed for	Social firms and other organisations interested in measuring their social, economic and environmental impact (SROI)
Available from	The new economics foundation
Price	Free to download from the new economics foundation website
Approach	Translation of social impact into financial measures
Practical tools	The guide is in itself a tool for carrying out an SROI analysis, explaining all stages of the process
Use of case examples	A case example is used throughout
Lists additional resources	No
Size	52 pages
Description	<p>This DIY guide is organised around the four stages of the nef SROI approach:</p> <p>Stage 1: Boundary setting and impact mapping</p> <p>Stage 2: Data collection</p> <p>Stage 3: Modelling and calculating the SROI</p> <p>Stage 4: Report and embed.</p> <p>Appendices contain:</p> <ol style="list-style-type: none"> 1. nef's seven principles of good measurement 2. storyboard exercise 3. impact map template. <p>This second edition aims to make economic analysis accessible to a range of audiences, including those with limited resources. There are fewer stages, and more thorough guidance on developing indicators and finding the right proxies. However, nef recommends that you also attend training or seek advice from an experienced SROI practitioner.</p>

Title	Investing in Impact: Developing Social Return on Investment
Developed by	EQUAL Social Economy Scotland Development Partnership
Year published	No year found.
Developed for	Government, public bodies, private philanthropists and charitable trusts and foundations.
Available from	Forth Sector Development
Price	Free to download from the Forth Sector Development website
Approach	SROI
Practical tools	Use of Impact Map.
Use of case examples	An SROI analysis is carried out on a proposal for a community reuse centre.
Lists additional resources	No
Size	76 pages
Description	This report is the culmination of a two-year pilot project, designed to test and develop the effectiveness of Social Return on Investment (SROI) as a way of measuring the impact of investment into social enterprises and other third sector organisations. It gives the outline of the SROI analyses of some individual organisations, provides a guide to predictive SROI for social investors and summarises the lessons and recommendations learned from the pilot project.

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Advocacy and policy work

Title	Lost in Translation: towards an outcome focused approach to advocacy provision
Developed by	Action for Advocacy
Year published	2009
Developed for	Advocacy organisations. Anyone interested in developing an outcomes-focused approach to advocacy work.
Available from	Action for Advocacy
Price	Free to download
Approach	Outcomes approach
Practical tools	Practical methods included
Use of case examples	Yes
Lists additional resources	List of references used
Size	35 pages
Description	<p>This is a toolkit for understanding, defining, measuring and communicating outcomes. It provides practical methods for developing an outcomes-focused approach to monitoring the quality of advocacy provision.</p> <p>Includes the mental health recovery star, outcomes star and other tools.</p>

Title	A guide to measuring advocacy and policy
Developed by	Researched and written by Jane Reisman, Anne Gienapp, Sarah Stachowiak
Year published	2007
Developed for	Primarily grantmakers and advocacy organisations, but useful for evaluators involved with measurement of advocacy and policy work
Available from	Organizational Research
Price	Free to download from the Organizational Research website
Approach	Outcomes approach
Practical tools	Outcomes framework with outcome categories
Use of case examples	Yes, case examples are used.
Lists additional resources	A handbook of data collection tools is available as a companion to this book.
Size	46 pages
Description	<p>This American guide helps determine meaningful ways to measure and evaluate the impact of advocacy and public policy grantmaking. It provides an outcomes framework with outcome categories for advocacy and policy work.</p> <p>The directions for evaluation design includes a broad range of methodologies, intensities, audiences, timeframes and purposes. The guide is presented in two main sections:</p> <p>Section 1 is an overview of the context for measurement of advocacy and policy work, including the inherent evaluation challenges.</p> <p>Section 2 presents a menu of outcome categories which describe changes that may result from advocacy and policy work and discusses evaluation design issues that relate to outcome selection. This section provides a case example and data collection tools.</p>

Title	Overview of Current Advocacy Evaluation Practice
Developed by	Julia Coffman for the Center for Evaluation Innovation
Year published	2009
Developed for	Individuals and organisations engaging in advocacy evaluation
Available from	The Center for Evaluation Innovation
Price	Free to download from the Center for Evaluation Innovation website
Approach	Overview of current practice, including evaluation design questions and common advocacy evaluation responses
Practical tools	Identifies tools and models used by other organisations for their advocacy evaluations.
Use of case examples	Yes, case examples are used.
Lists additional resources	Some additional websites relevant to advocacy evaluation are listed.
Size	14 pages
Description	<p>This document highlights the kinds of approaches being used in advocacy evaluation, offers specific examples of how they are being used, who is using them, and identifies the advantages and disadvantages of each approach. It also identifies four key evaluation design questions and then offers common advocacy evaluation responses to those questions. The questions used are:</p> <ul style="list-style-type: none"> • Evaluator: Who will do the evaluation? • Focus: What will the evaluation measure? • Timing: When will the evaluation take place? • Approach: What methodology will the evaluation use?

Title	A User's Guide to Advocacy Evaluation Planning
Developed by	Julia Coffman for the Harvard Family Research Project
Year published	2009
Developed for	This tool was developed for advocates, evaluators, funders, or other stakeholders who want guidance on how to evaluate advocacy efforts.
Available from	Harvard Family Research Project
Price	Free to download from the Harvard Family Research Project website
Approach	Evaluation planning steps
Practical tools	Advocacy and policy change composite logic model: common advocacy evaluation methods such as surveys and observation are described
Use of case examples	No
Lists additional resources	Additional copies of the user guide are listed
Size	25 pages
Description	<p>The tool has four steps to complete in sequence:</p> <ul style="list-style-type: none"> • Step 1: Focusing • Step 2: Mapping • Step 3: Prioritizing • Step 4: Designing. <p>It introduces several key evaluation planning steps and helps users think about and be active participants in the process, and provides guide to which outcomes will be measured and how. The appendix provides a blank worksheet for users to complete the planning steps for their own advocacy strategies.</p>

Title	A Handbook of Data Collection Tools: companion to a guide to measuring advocacy and policy
Developed by	Jane Reisman, Anne Gienapp and Sarah Stachowiak
Year published	2007
Developed for	Primarily developed for grantmakers and advocacy organisations, but useful for evaluators involved with measurement of advocacy and policy work.
Available from	Organizational Research
Price	Free to download from the Organizational Research website
Approach	A range of data collection tools for advocacy and policy work
Practical tools	Self-assessment tools and methods including sample tools
Use of case examples	Yes
Lists additional resources	No
Size	51 pages
Description	<p>This American handbook of data collection tools is intended to serve as a companion to <i>A Guide to Measuring Advocacy and Policy</i>. The handbook provides examples of practical tools and processes for collecting useful information from policy and advocacy efforts for both grantees and funders. Sample tools to measure the core outcome areas related to social change or policy change are also available.</p> <p>Each section contains practical information for those involved in many different aspects of advocacy and policy change work.</p>

Advocacy and policy influence

Title	A Guide to Monitoring and Evaluating Policy Influence: ODI background note
Developed by	Harry Jones for the Overseas Development Institute (ODI)
Year published	2011
Developed for	Researchers and Civil Society Organisations
Available from	Overseas Development Institute
Price	Free to download from the Overseas Development Institute website
Approach	Monitoring and evaluation of policy
Practical tools	Tool for assessing policy influencing approaches
Use of case examples	Real life projects are used as examples to illustrate concepts
Lists additional resources	It provides some suggestions for further reading.
Size	12 pages
Description	<p>This paper provides an overview of approaches to monitoring and evaluating policy influence, based on an exploratory review of the literature and selected interviews with expert informants, as well as ongoing discussions and advisory projects for policy-makers and practitioners who also face the challenges of monitoring and evaluation. There are a number of lessons and tools useful for the evaluation and monitoring of policy.</p> <p>The paper also outlines key considerations for developing a Theory of Change. The paper concludes with key recommendations for developing monitoring and evaluation frameworks for policy influencing activities.</p>

Arts

Title	Partnerships for Learning: a guide to evaluating arts education projects
Developed by	Felicity Woolf for the Regional Arts Boards and the Arts Council of England
Year published	Revised and updated in 2004
Developed for	Teachers, youth and community workers, students, voluntary groups and others involved in arts projects
Available from	The Arts Council of England website
Price	Free download available from the Arts Council of England website
Approach	Self-evaluation
Practical tools	Appendix 3 contains some examples of data collection tools, such as questionnaire formats, and some tips on other techniques, such as small group discussion and use of photography.
Use of case examples	Short case examples are used to illustrate the text.
Lists additional resources	Some additional resources relevant to arts projects listed.
Size	72 pages
Description	<p>This resource was piloted by 18 groups and organisations throughout England. The guide is suitable for those who have little experience of monitoring and evaluation and is designed for those required to complete a simple form or to return a full report.</p> <p>It is organised within a framework of five stages of evaluation:</p> <ul style="list-style-type: none"> • planning • collecting evidence • assembling and interpreting • reflecting and moving forward • reporting and sharing. <p>The guide also covers issues that need to be considered when planning and carrying out evaluation, such as safeguarding issues for children, young people and vulnerable people. It looks at setting standards for self-evaluation and advantages and disadvantages of carrying out internal or external evaluation.</p>

Title	Evaluation toolkit for voluntary and community arts in Northern Ireland
Developed by	Annabel Jackson Associates for Arts Council Northern Ireland
Year published	2004
Developed for	Voluntary and community arts organisations in Northern Ireland
Available from	Prove and Improve
Price	Free to download from the Prove and Improve website
Approach	Self-evaluation
Practical tools	
Use of case examples	Sample questionnaires/monitoring forms for use with a range of different programme participants
Lists additional resources	
Size	97 pages
Description	<p>This evaluation toolkit is aimed at helping arts organisations increase their own capacity for evaluation and integrate evaluation into day-to-day operations.</p> <p>It provides an introduction to evaluation and the evaluation process with links to the tools in the toolkit.</p>

Title	Tear Up Your Tick Boxes - A Guide to the Creative Evaluation of Participatory Arts Projects
Developed by	Voluntary Arts Wales
Year published	Not found
Developed for	Arts organisations running events
Available from	Voluntary Arts Network: info@voluntaryarts.org
Price	Available from Voluntary Arts Network
Approach	Self-evaluation
Practical tools	The guide introduces a 'chuff chart' and other participatory monitoring materials for use with young people, including an 'archery target'
Use of case examples	A case study of a theatre company is used in Part 2.
Lists additional resources	No
Size	38 pages
Description	<p>This two-part guide presents 12 key questions that take organisations from planning an event, through the event itself and up to an assessment of how well it went, the changes you might want to see and what you might want to do with the information.</p> <p>The guide also suggests different ways of measuring attendance, responses and views. The second part introduces the concept of social exclusion, a case study, and practical monitoring and evaluation challenges, accompanied by tools and monitoring materials and templates for use with young audiences.</p>

Title	Demonstrating the value of arts in Criminal Justice
Developed by	Charities Evaluation Services for the Arts Alliance
Year published	2011
Developed for	Arts organisations working in criminal justice
Available from	Clinks
Price	Free to download from the Clinks website
Approach	Self-evaluation
Practical tools	Practical guide. Appendix contains a worked monitoring and evaluation framework for a music programme.
Use of case examples	Four detailed case examples are used in part two of the guide. Examples are used throughout the text.
Lists additional resources	Yes
Size	48 pages
Description	This guide builds on the Clinks publication <i>Demonstrating Effectiveness</i> , which provides guidance on setting up monitoring and evaluation for organisations working in the criminal justice system. It details good practice, including how to focus evaluation around key questions and indicators. It also discusses choosing credible data collection methods and ethical issues, and how to draw data together, analysing and reporting it effectively.

Children and young people

Title	Youth Arts in Practice: a guide to evaluation
Developed by	Linda Dixon and Nicola Aylward for The National Institute of Adult Continuing Education (England and Wales)
Year published	2006
Developed for	Managers and practitioners delivering youth arts activities
Available from	Young Adults Learning Partnership (YALP)
Price	Available from the YALP team
Approach	Self-evaluation
Practical tools	This guide is focused on providing an overview of a wide range of tools designed to evaluate arts activities with young people.
Use of case examples	Section three, the main section of the guide, contains detailed case studies from five projects, including illustration of the tools used and the findings.
Lists additional resources	No
Size	104 pages
Description	<p>This guide is designed to demonstrate the use of a wide range of creative tools, rather than to introduce the theory of evaluation. It is hoped that other organisations will be inspired to copy and use the tools. Five arts organisations were involved in the project, and the guide sets out the context of each organisation, illustrates the tools themselves and how they were used, and the findings obtained.</p> <p>The tools range from easy-to-use and pictorial questionnaires, to peer observation, individual record forms, diamond ranking, weather mood report and others. Difficulties in developing and using the tools are also reported.</p>

Title	A Guide to actively involving young people in research: for researchers, research commissioners, and managers
Developed by	Perpetua Kirby for the INVOLVE Support Unit
Year published	2004
Developed for	Primarily for researchers and commissioners of research
Available from	INVOLVE
Price	Free to download from the INVOLVE website
Approach	Involving young people in research
Practical tools	Key points for each chapter
Use of case examples	No
Lists additional resources	Useful publications at the end
Size	34 pages
Description	This guide is about why and how to actively involve young people (aged 12 to 21 years) as researchers within health and social care research. It covers the benefits of involving young people, when and how to involve young people, the power issues of involving young researchers and how to identify and support young people to get involved, ensuring their health, safety and well-being.

Title	Capturing the Evidence: Tools and processes for recognising and recording the impact of youth work
Developed by	Hilary Comfort, Bryan Merton, Malcolm Payne and Wendy Flint for the National Youth Agency.
Year published	2006
Developed for	The tools in this publication are intended to offer youth workers or youth service organisations examples of ways they can recognise and record what young people gain from the youth work they are involved in.
Available from	National Youth Agency
Price	Available from the National Youth Agency website
Approach	Outcome measurement tools used in youth service organisations
Practical tools	Examples of tools used include outcomes wheel, DIY card sort, blob tree, KSAF activity and survey.
Use of case examples	Example of a questionnaire derived from the KSAF Activity using the Sexual Health And Relationship 'Konsiderations' (SHARK) programme and a number of other case examples.
Lists additional resources	No
Size	94 pages
Description	<p>The document offers a variety of tools by which organisations working with young people can measure the impact of their programmes and use the information to demonstrate what youth services achieve.</p> <p>The publication aims to capture the social and learning gains young people derive from the youth work they engage in as well as evidence of how they may apply this elsewhere in their lives.</p>

Title	Manual for Measures of Caring Activities and Outcomes for Children and Young People
Developed by	Stephen Joseph, Fiona Becker, Saul Becker for the Princess Royal Trust for Carers.
Year published	2009
Developed for	Professionals in the fields of health and social care (including young carers workers, social workers, nurses, psychologists, psychiatrists, youth workers) as well as those researching care-giving, and caring organisations themselves.
Available from	Carers Trust
Price	Free to download from the Carers Trust website
Approach	Outcome measurement
Practical tools	Positive and Negative Outcomes of Caring (PANOC-YC20) and the Multidimensional Assessment of Caring Activities (MACA-YC18). Both are questionnaires.
Use of case examples	No
Lists additional resources	An extended version of the MACA-YC18 (the MACA-YC42), and two short questionnaires: 'What I like and dislike about caring', and 'Me and my young carer's project'.
Size	28 pages
Description	<p>The manual introduces two instruments for the assessment of caring.</p> <p>The Multidimensional Assessment of Caring Activities is a questionnaire (an 18-item self-report measure) that can be used to provide an index of the total amount of caring activity undertaken by the young person, as well as six subscale scores for domestic tasks, household management, personal care, emotional care, sibling care, and financial/practical care.</p> <p>The Positive and Negative Outcomes of Caring is a questionnaire (20-item self-report measure) that can be used to provide an index of positive and negative outcomes of caring.</p>

Title	Set of 80 Consultation Cards with Illustrations
Developed by	Department of Health
Year published	2005
Developed for	Anyone working with people with a learning disability
Available from	Department of Health
Price	Free to download
Approach	
Practical tools	Consultations pictures
Use of case examples	No
Lists additional resources	No
Size	84 pages
Description	A useful set of cards, with pictures, that may be useful for communicating in a more accessible way with people with a learning disability on a range of topics.

Title	Are you listening! A toolkit for evaluating Children's Fund services with children and young people
Developed by	Cambridgeshire Children's Fund and Save the Children
Year published	2005
Developed for	Cambridgeshire Children's Fund projects and other children's services.
Available from	Cambridgeshire Children's Fund
Price	Free to download from the Cambridgeshire Children's Fund website
Approach	Participative evaluation – how to involve and include children in the evaluation process
Practical tools	This is a how-to-do-it guide for each activity for gathering data and evaluating the whole project.
Use of case examples	Case studies from Cambridgeshire Children's Fund (CCF) projects
Lists additional resources	Two pages of useful resources and websites plus appendices
Size	80 pages
Description	<p>This is a very helpful toolkit looking at a range of creative, fun activities that can be built into a projects programme for children aged 5-13 years. The toolkit is divided into four sections, plus appendices:</p> <ul style="list-style-type: none"> • Section 1: Every Child Matters – describes national policy and developments around children's services • Section 2: A quick guide to evaluation and participative evaluation • Section 3: The project planning cycle and the evaluation process • Section 4: Activities and resources – how to gather information for evaluation • Appendices – reference information on the 1989 UN Convention on the Rights of the Child, a summary of CCF evaluation and reporting requirements.

Title	Step it Up
Developed by	University of Strathclyde
Year published	2003
Developed for	Youth workers and young people developing work with young people across Scotland. Also useful for other organisations.
Available from	YouthLink Scotland
Price	Free to download from the YouthLink Scotland website
Approach	Self-evaluation
Practical tools	Worksheets and guidance on how to use them, practical online tool
Use of case examples	Case study examples used to illustrate explanations
Lists additional resources	Yes
Size	The report is 100 pages and there is also an online tool.
Description	<p>The Step It Up materials provide a guide to social and emotional competences in youth work settings and offer practical links to curriculum development.</p> <p>The materials are based on a set of social and emotional competences, which derive from the purpose of youth work and are highly relevant to the kind of learning which young people gain in youth work settings.</p> <p>Step It Up components:</p> <ul style="list-style-type: none"> • A report of the project, including research and findings, the purpose of youth work, the range of competences, and curricular links. • A specially designed self-assessment programme providing a structure for young people to chart progress in social and emotional development and show evidence of this. • A training package to support individuals in the use of Step It Up, and those training others.

Title	Framework for the assessment of children in need and their families - the family pack of questionnaires and scales
Developed by	A Cox and A Bentovim for the Department of Health
Year published	2000
Developed for	Professionals and care services
Available from	Department of Health
Price	Free to download from the Department of Health website
Approach	Self assessment
Practical tools	Questionnaires and scales are included in the pack.
Use of case examples	None
Lists additional resources	No
Size	The booklet is 109 pages, and the pack of questionnaires and scales is 50 pages.
Description	<p>A booklet setting out how to assess, analyse and record what is happening to children and young people within their families and in their communities.</p> <p>The pack contains a number of questionnaires and scales that can be used by social work and other social services staff when assessing children and their families.</p> <p>The materials were piloted in a number of childcare situations within five social service departments, and modified to suit children and their families and the requirements of staff working in this setting.</p> <p>The following eight questionnaires and scales are included in the pack:</p> <ul style="list-style-type: none"> • The Strengths and Difficulties Questionnaire • The Parenting Daily Hassles Scale • Home Conditions • Scale Adult Wellbeing Scale • The Adolescent Wellbeing Scale • The Recent Life Events Questionnaire • The Family Activity Scale • The Alcohol Scale.

Title	Measuring Impact toolkit
Developed by	Kent Children's Fund
Year published	No date found
Developed for	People working with children, both frontline workers and directors and managers of organisations and projects
Available from	Kent Children's Fund
Price	Free to download from the Kent Children's Fund website
Approach	Measuring the impact of projects and programmes
Practical tools	Main emphasis on tools to use with children and young people to find out how they feel about projects and services. Appendices include templates for interview schedules and forms.
Use of case examples	Examples used throughout
Lists additional resources	A whole section on documents used, other organisations providing support, publications and glossary.
Size	109 pages
Description	<p>The 'MI Toolkit' is designed to help organisations working with children to tell the story of their work and what they are doing well. The toolkit is set out in a clear and accessible way. It includes the following sections:</p> <p>Section 1 provides a guide to using the toolkit.</p> <p>Section 2 discusses what impact means and helps break it down into component parts.</p> <p>Section 3 lists principles for impact measurement.</p> <p>Section 4 is a guide to setting realistic and measurable indicators.</p> <p>Section 5 provides a set of specific tools for use with children.</p> <p>Section 6 advises on putting together a report to show impact.</p> <p>Section 7 lists further information and links.</p>

Title	Evaluation Kit: sexual health services for young people
Developed by	Kaye Wellings and Roslyn Kane for the Sexual Health Programme at the London School of Hygiene and Tropical Medicine
Year published	2000
Developed for	Health professionals working in services for young people
Available from	London School of Hygiene and Tropical Medicine
Price	Price not found
Approach	General introduction to evaluation
Practical tools	Topic guidance sheets: <ul style="list-style-type: none"> • in depth interview with client • questionnaire for service users • questionnaire for service providers • how to use routine data sources.
Use of case examples	No
Lists additional resources	No
Size	5 pages plus 4 guidance sheets
Description	A brief and basic guide considering the issues when planning an evaluation and some methods to use. It also contains four topic guidance sheets.

Title	Young roots evaluation pack
Developed by	QA Research for the Heritage Lottery Fund
Year published	Not found
Developed for	Voluntary and community organisations funded by the Heritage Lottery Fund to run Young Roots projects. Although the focus is on working with young people, it contains useful activities that could be used or adapted for collect monitoring and evaluation data from different stakeholder groups.
Available from	Heritage Lottery Fund
Price	Free to download from the Heritage Lottery Fund website
Approach	Participatory
Practical tools	Evaluation planning template, questions and prompt cards and practical tips on different elements of the evaluation process. It also includes twenty-five different activities in order to gather user feedback
Use of case examples	Examples of the planning template are included
Lists additional resources	Contains a short further reading list on young people and research
Size	43 pages
Description	The pack has been put together to help organisations evaluate their Young Roots project. It provides a short introduction to evaluation and contains 25 different participatory activities that be used to collect monitoring and evaluation information. These include guided visualisation, bean count, making a line, timelines and mapping. The pack is also available in Welsh and as audio cassette.

Title	Impact Guides
Developed by	Canterbury Christ Church University
Year published	Not found
Developed for	Voluntary and community organisations, and researchers
Available from	Canterbury Christ Church University
Price	Free to download from the Canterbury Christ Church University website
Approach	7 short guidance papers providing a practical introduction to impact measurement
Practical tools	No
Use of case examples	No
Lists additional resources	Some listed in Guide 5 - Statistics and Data Presentation
Size	7 guides
Description	<p>The guides are intended for both the general reader and more experienced researcher. They explain what is meant by measuring the impact of Study Support and Extended Services on learners and organisations. They acknowledge that impact is wide ranging and as such can relate to both qualitative and quantitative outcomes.</p> <p>They aim to provide clear and practical guidance from forming the initial research questions through to data collection, interpretation and analysis and finally reporting outcomes.</p> <p>There are seven guides available to download:</p> <ol style="list-style-type: none"> 1. Getting started 2. Data collection 3. Drawing conclusions 4. Sample size and control groups 5. Statistics and presentation 6. Qualitative data 7. Strategy guide.

Community organisations

Title	Prove and Improve – a self-evaluation resource for voluntary and community organisations
Developed by	Community Evaluation Northern Ireland (CENI) based on CENI's evaluation training and development project funded by the Big Lottery Fund
Year published	2008
Developed for	Voluntary and community organisations that want to explore evaluation, in particular self-evaluation of outcomes
Available from	CENI
Price	Free to download from the Innovation Network website
Approach	CENI self-evaluation model
Practical tools	There is a think section on each step in the self-evaluation process.
Use of case examples	Lots of examples, case studies and feedback from people
Lists additional resources	The signposting section provides information about available support in evaluation, including useful documents and website materials.
Size	40 pages
Description	<p>This guide focuses on self-evaluation. Using CENI's model and approach, it breaks the process down into a series of logical steps and stages:</p> <ul style="list-style-type: none"> • planning • collecting evidence • analysis • reporting • using evaluation.

Health promotion

Title	Evaluating health promotion programs
Developed by	The Health Communication Unit at the Centre for Health Promotion, University of Toronto
Year published	2006
Developed for	Health practitioners and others working in the field of health promotion
Available from	The Health Communication Unit at The Centre for Health Promotion
Price	Free to download from the Health Communication Unit at The Centre for Health Promotion website
Approach	Outcomes monitoring
Practical tools	This workbook includes example documents and work sheets in each section allowing the reader to fill in information appropriate to their work.
Use of case examples	No
Lists additional resources	Additional resources are listed in sections in an appendix at the end.
Size	102 pages
Description	A fairly text-heavy workbook providing an overview of key concepts and methods in the development and implementation of programme evaluations. It uses a ten-step model for monitoring and evaluating health promotion work.

HIV/AIDS

Title	Tools Together Now: 100 participatory tools to mobilise communities for HIV/AIDS
Developed by	International HIV/AIDS Alliance
Year published	2006
Developed for	Any organisation working on HIV/AIDS, but particularly those working directly with communities affected by HIV/AIDS
Available from	International HIV/AIDS Alliance
Price	Free to download from the International HIV/AIDS Alliance website
Approach	Participatory Learning and Action (PLA)
Practical tools	This resource contains 100 participatory tools, covering all aspects of working with communities affected by HIV/AIDS. Within that there are tools specific to evaluation processes.
Use of case examples	No
Lists additional resources	Very limited number of HIV/AIDS specific resources signposted
Size	250 pages
Description	<p>This resource contains a wealth of participatory tools covering all aspects of working with communities affected by HIV/AIDS. Section C, which contains time analysis tools, is particularly relevant to evaluation. Other sections also provide tools that can be used for:</p> <ul style="list-style-type: none"> • information collection (Section D) • experiential tools (Section E) • prioritisation and quantification tools (Section F) • action planning tools (Section G). <p>There is also some useful material on working with participatory methods, and the tools themselves lend themselves quite easily to transfer into other areas of work.</p>

Title	Handbook of Indicators for HIV/AIDS/STI Programs
Developed by	Bureau for Global Programs, Field Support and Research Center for Population, Health and Nutrition Office of Health and Nutrition for the USAID
Year published	2000
Developed for	Mission and regional Population, Health, and Nutrition officers and field support staff at the project level, including all projects supported under the Strategic Support Objective (SSO) 4 portfolio
Available from	USAID
Price	Free to download from the USAID website
Approach	Indicator identification and measurements for HIV/AIDS programmes
Practical tools	No
Use of case examples	No
Lists additional resources	No
Size	129 pages
Description	<p>This handbook presents indicators for monitoring and evaluating USAID-supported programmes. For each indicator, definitions, data sources, purposes, and strengths and limitations are described. Additional indicators for programmes such as sexual behaviour among young people and mother to child transmission of HIV are also provided.</p> <p>The guide also includes four 'methods packages' which provide valuable information on state-of-the-art data collection instruments and measurement tools necessary for the application of many of the indicators in the handbook.</p>

Homelessness

Title	The Outcomes Star
Developed by	Triangle Consulting for London Housing Foundation
Year published	2006
Developed for	Organisations working with homeless people, although likely to be useful for other client groups such as people with mental health problems and young people
Available from	London Housing Foundation Homeless Outcomes
Price	Free to download from the Homeless Outcomes website
Approach	Measuring soft outcomes
Practical tools	<p>A practical tool for measuring the outcomes of work with homeless people. It is completed by service users with support from key workers.</p> <p>Additional practical tools for use by key worker and managers are provided in the supporting documents that accompany the Outcome Star.</p>
Use of case examples	Examples of completed tools are provided
Lists additional resources	No
Size	20 pages for the introduction to the Outcomes Star
Description	<p>The Outcomes Star is a tool to measure change when working with vulnerable service users. It has been developed to measure distance travelled and should be used as an integral part of the support process.</p> <p>Using the tool also helps users to take an overview of their own situation and helps them to see what the next steps are for them. The London Housing Foundation has developed a website dedicated to sharing knowledge about outcomes. The Outcomes Star Collection is available on the website.</p> <p>The Outcomes Star Collection comprises:</p> <ul style="list-style-type: none"> • The Outcomes Star • The Outcome Star - A Guide for Key Workers • The Outcomes Star - A Guide for Managers • Using the Outcomes Star - A One-Day Training Course <p>The website also provides information on how the Outcomes Star relates to the Supporting People Outcomes and the Communities and Local Government framework.</p>

Title	Managing Outcomes: A Guide for Homelessness Organisations
Developed by	Sara Burns and Sally Cupitt for Charities Evaluation Services
Year published	2003
Developed for	This guide is for all those working in the homelessness field, although it is also likely to be helpful to those working in associated areas, such as housing or substance misuse.
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Outcomes assessment
Practical tools	Practical tips on developing indicators and tools for gathering information on outcomes
Use of case examples	Examples and discussion points are drawn from a range of homelessness services, many of which have substantial experience in implementing and using outcome monitoring systems.
Lists additional resources	Limited
Size	40 pages
Description	<p>This is a practical guide to the effective use of outcome management within the homelessness field. The advice and recommendations it contains are based on the experience of a wide range of voluntary sector organisations.</p> <p>The guide will be useful for those who are already familiar with outcomes as well as for those looking at outcomes for the first time.</p>

Infrastructure organisations

Title	Demonstrating the difference
Developed by	Sally Cupitt with Anastasia Mihailidou for the National Performance Programme (NPP)
Year published	2009
Developed for	The voluntary and community sector in England (particularly infrastructure organisations). Anyone interested in the issues faced by organisations in demonstrating their difference.
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Outcomes issues for infrastructure organisations
Practical tools	
Use of case examples	Yes
Lists additional resources	A bibliography is provided at the end.
Size	60 pages
Description	<p>This research report investigates how well infrastructure organisations are able to demonstrate the difference their work makes.</p> <p>The report focuses on the following topics:</p> <ul style="list-style-type: none"> • the importance of demonstrating difference in the current climate and in the future • the nature of infrastructure • the information collected by infrastructure organisations • challenges of demonstrating difference • tools in use by infrastructure organisations • good practice • what would help – respondents’ perspectives • recommendations.

Title	Measuring effectiveness: a self-evaluation toolkit for the national network of Councils for Voluntary Service
Developed by	Charities Evaluation Services and NAVCA
Year published	2002
Developed for	Councils for Voluntary Service and other infrastructure organisations
Available from	NAVCA
Price	Free to download from the NAVCA website
Approach	A self-evaluation toolkit for the national network of Councils for Voluntary Service (CVS)
Practical tools	This is a practical toolkit with 15 monitoring and evaluation tools focused on local infrastructure work.
Use of case examples	Examples of output, outcome and impact indicators are provided, based around core aims
Lists additional resources	No
Size	82 pages
Description	<p>The toolkit:</p> <ul style="list-style-type: none"> • introduces a simple framework for self-evaluation • provides a step-by-step process by which CVS can identify their evaluation priorities • details how to evaluate different areas of your work, for example, your training and development support work • can be modified and tailored to your own needs. The tools include example questions for a membership survey, enquiries monitoring form and client feedback forms • includes guidance on using different methods for gathering data and guidance on writing evaluation reports.

Title	Distance travelled: the experience of outcome monitoring within NCVO's Sustainable Funding Project
Developed by	NCVO
Year published	2006
Developed for	Any organisation wanting to develop an outcomes approach
Available from	NCVO
Price	Free to download from the NCVO website
Approach	Outcome monitoring
Practical tools	An outcomes triangle, mission map, event evaluation form and policy grid are included. Good practice tips included in all sections.
Use of case examples	A case study is used throughout the guide.
Lists additional resources	Lists of publications and other sources of support and advice are listed.
Size	25 pages
Description	This publication provides a case study example and good practice tips on implementing outcome monitoring in an infrastructure setting.

International development

Title	Guidance on evaluation and review for DFID staff
Developed by	DFID
Year published	2005
Developed for	DFID staff and all partners involved in DFID programmes. Useful for people carrying out international work.
Available from	DFID archives
Price	Free to download from the DFID website archives
Approach	International development: a DFID guide to designing, managing, reporting and responding to an evaluation.
Practical tools	Lots of useful diagrams and flow-charts. Includes a sample final evaluation report structure and a speed checklist in every chapter.
Use of case examples	None
Lists additional resources	Lots of additional references including a glossary.
Size	89 pages
Description	<p>This is a comprehensive resource guide for DFID staff and partners. Useful for others in international development.</p> <p>Chapters 1–3 provides a useful introduction to international development and evaluation including the different types of evaluation.</p> <p>Chapter 4-6 explains the evaluation process, terms of reference and roles and skills required.</p> <p>Chapter 7-9 covers reporting, using evaluations, sharing lessons and stakeholders role.</p> <p>The annex provides more detail and references to web-based resources and further reading including the following: international development evaluation standards; glossary and standard research terms used in monitoring and evaluation.</p>

Title	Review of the use of 'Theory of Change' in International Development
Developed by	Isabel Vogel for the UK Department of International Development
Year published	2012
Developed for	DFID, to inform a more consistent approach within the organisation.
Available from	DFID
Price	Free to download from the DFID website
Approach	Theory of change
Practical tools	Log-frames; Impact maps.
Use of case examples	Examples are also provided to illustrate people's experience, from donors to implementing agencies and projects.
Lists additional resources	Additional list of websites for evaluation purposes are given.
Size	86 pages
Description	<p>An introduction to theory of change in the International development sector. A brief history of the development of theory of change is given. It also provides an overview of the use of theory of change in practice.</p> <p>A comprehensive list of theories of change for several projects is provided in the appendix as well as guidelines and tools to support people working with theory of change.</p>

Title	Toolkits: A practical guide to monitoring, evaluation and impact assessment
Developed by	Louisa Gosling with Mike Edwards for Save the Children
Year published	2003 (second edition)
Developed for	International development workers
Available from	Save the Children
Price	Available from Save the Children
Approach	
Practical tools	It includes a range of practical tools that can be adapted to suit different circumstances.
Use of case examples	Case examples are used to illustrate the text.
Lists additional resources	Contains a section of references and further resources under various headings, such as impact assessment, information collection, emergencies.
Size	350 pages
Description	<p>This new edition of <i>Toolkits</i> has substantially revised and updated a key text for international development workers and those working in emergency situations.</p> <p>Part 1 covers general issues and principles underlining planning, monitoring and evaluation, such as involving relevant people, dealing with differences, being systematic about the analysis and collection of information.</p> <p>Part 2 covers in more detail the whole process of monitoring, evaluation and impact assessment. This revised edition provides a new chapter looking at impact assessment - an area of increasing importance to both practitioners and donors. There is also a new chapter and tool on monitoring and evaluating advocacy.</p> <p>Part 3 contains 14 practical monitoring and evaluation tools.</p>

Title	Impact measurement and accountability in emergencies: the good enough guide
Developed by	Oxfam GB for the Emergency Capacity Building Project
Year published	2007
Developed for	Field workers
Available from	Oxfam
Price	Free to download from the Oxfam website
Approach	Accountability and impact measurement
Practical tools	A section on tools provides fourteen guidance notes and checklists including different ways of involving people, data collection methods, how to introduce your agency.
Use of case examples	Case study examples used in each section
Lists additional resources	A section on other resources is included.
Size	74 pages plus CD
Description	<p>The guide aims to help field workers address the questions ‘What difference are we making?’ and ‘How do we know?’</p> <p>It offers a set of basic guidelines on how to be accountable to local people and measure programme impact in emergency situations. It emphasises simple and practical solutions and encourages the reader to choose tools that are safe, quick, and easy to implement.</p> <p>The accompanying CD allows internal cross-referencing and links to external sources when connected to the internet.</p>

Title	Monitoring and evaluation: some tools, methods and approaches
Developed by	The World Bank
Year published	2004
Developed for	Government officials, development managers and civil society
Available from	The World Bank
Price	Free to download from The World Bank website in English; Arabic; French; Portuguese; Russian; Spanish.
Approach	Self-evaluation
Practical tools	No
Use of case examples	No
Lists additional resources	Each section has a list of additional publications or support available.
Size	24 pages
Description	<p>A simple and basic introduction to monitoring and evaluation, some methods and approaches and data collection methods. Each of the following sections is summarised, giving its purpose and use, advantages and disadvantages, costs, skills, and time required, as well as key references.</p> <p>The booklet discusses:</p> <ul style="list-style-type: none"> • performance indicators • the logical framework (logframe) approach • theory-based evaluation • formal surveys • rapid appraisal methods • participatory methods • public expenditure tracking surveys • impact evaluation • cost-benefit and cost-effectiveness analysis.

Learning and skills

Title	Catching confidence: the nature and role of confidence – ways of developing and recording changes in the learning context
Developed by	Jane Eldred, Jane Ward, Kay Snowdon and Yanina Dutton for NIACE
Year published	2005
Developed for	Adult learning providers and tutors
Available from	NIACE
Price	Free to download from the NIACE website
Approach	Process and tool for defining and assessing confidence
Practical tools	Original tool and examples of local variations included
Use of case examples	No
Lists additional resources	No
Size	27 pages
Description	This pack is designed to assist both in defining and assessing confidence. Eight organisations working with 41 groups and involving some 350 learners participated in the development of the process and in testing the tool. Data and feedback from these groups were collated to produce the pack.

Mental Health

Title	Mental health improvement evidence and practice (Guides 1-4)
Developed by	Published by Health Scotland
Year published	2005
Developed for	The guides are intended to help practitioners design evaluations to take account of the challenges of assessing the effectiveness of mental health improvement interventions.
Available from	Health Scotland
Price	Free to download from the Health Scotland website
Approach	Self-evaluation
Practical tools	None
Use of case examples	Some use of case examples
Lists additional resources	Each guide lists resources and a glossary.
Size	Each guide is around 30 pages.
Description	<p>The four guides cover the following topics:</p> <p>Evidence-based Practice introduces mental health, the evaluation process and evidence-based practice.</p> <p>Measuring Success tackles the questions of who defines success and what measures are useful. The guide also provides a framework for measuring different elements of a mental health project.</p> <p>Getting Results covers planning, designing and conducting an evaluation including types of data and data collection.</p> <p>Making an Impact focuses on analysis and interpretation of results, reporting and writing a research article.</p>

Mentoring and Befriending

Title	Monitoring and evaluating outcomes in mentoring and befriending toolkit
Developed by	Andrew Miller, Mentoring and Befriending Foundation
Year published	2012
Developed for	Individuals and organisations wanting to improve mentoring practice and results. It is applicable to a variety of contexts.
Available from	Mentoring and Befriending Foundation
Price	Available from the Mentoring and Befriending Foundation website
Approach	Self-evaluation and external evaluation – practical step-by-step guidance.
Practical tools	Ready to use templates
Use of case examples	Good practice examples
Lists additional resources	Further resources are available on the Monitoring and Befriending Foundation website.
Size	23 pages
Description	This toolkit is designed to give practical step-by-step guidance for both those new to monitoring and evaluation and those already monitoring some aspects of their work. The toolkit works through 12 steps – from planning, identifying outputs and outcomes and data collection to writing up and using findings.

Title	The Evaluation Toolkit
Developed by	Jo Kennedy, Ian McKenzie and Helen Wilson for Befriending Network Scotland
Year published	2006
Developed for	Mentoring and befriending organisations
Available from	Befriending Network Scotland
Price	Free to download from the Befriending Network Scotland website
Approach	Self-evaluation
Practical tools	The pack contains example tools and activities throughout.
Use of case examples	Some case examples are integrated into the text.
Lists additional resources	Further resources are indicated at the end of each section.
Size	122 pages
Description	<p>This pack was based on research among large and small mentoring and befriending organisations. It provides information on models of mentoring that might form the basis of evaluation, and guidance on the process of evaluation and practical tools to carry it out. The pack is written in five sections.</p> <p>Section 1 discusses agreeing a vision and organisational or project outcomes – the difference you are trying to make.</p> <p>Section 2 examines what kind of evidence will be needed and includes information on selecting indicators and using them to obtain evidence.</p> <p>Section 3 looks at different ways of gathering evidence.</p> <p>Section 4 looks at how to analyse evidence and learn from evaluation.</p> <p>Section 5 examines how to compile monitoring and evaluation reports.</p> <p>Each section provides examples, resources and practical tips.</p>

Title	Measuring impact: Improving the health and wellbeing of people in mid-life and beyond
Developed by	National Institute for Health and Clinical Excellence (NICE)
Year published	2005
Developed for	Practitioners and policy makers in the field of health improvement and wellbeing for people in the age group of mid-life and beyond
Available from	National Institute for Health and Clinical Excellence
Price	Free to download from the NICE website
Approach	Measuring outcomes and impact – self-evaluation
Practical tools	A menu of methods for measuring effectiveness
Use of case examples	Examples from the Health Development Agency mid-life programme of work.
Lists additional resources	Some additional resources listed but few additional sources of information on monitoring and evaluation.
Size	26 pages
Description	This toolkit is designed to encourage practitioners to incorporate measuring impact and effectiveness into their everyday work patterns. The toolkit provides a menu of methods for measuring effectiveness that are intended to be easily adapted to local contexts. Methods include carrying out a survey, using routinely collected information, interviews and focus groups, using a reflective diary, providing photographs as evidence and measuring cost effectiveness.

Title	Demonstrating effectiveness
Developed by	Charities Evaluation Services for Clinks
Year published	2010
Developed for	Organisations who involve volunteers, or provide mentoring and befriending services to offenders and ex-offenders
Available from	Clinks
Price	Free to download from the Clinks website
Approach	Self-evaluation
Practical tools	Practical guide
Use of case examples	Used throughout
Lists additional resources	Yes
Size	44 pages
Description	This guide provides an introduction to the systems and approaches required to monitor and evaluate services offered and changes brought about by organisations working in the criminal justice system.

Refugee Community Organisations

Title	Becoming more effective – a monitoring and evaluation guide for refugee community organisations
Developed by	Shehnaaz Latif for Charities Evaluation Services
Year published	2008
Developed for	RCOs who have little or no experience of monitoring and evaluation
Available from	Charities Evaluation Services
Price	Free to download from the Charities Evaluation Services website
Approach	Self-evaluation with a focus on outcomes
Practical tools	Checklists for each section helping you to think about what you need to do when you monitor and evaluate your project
Use of case examples	Yes
Lists additional resources	Explanation of terms at the end
Size	36 pages
Description	<p>This plain English easy-to-follow guide describes the CES five-step approach to monitoring and evaluation. Each step is demonstrated by an example of a refugee community association.</p> <p>There are five sections in the guide:</p> <ul style="list-style-type: none"> • What are monitoring and evaluation? • What you do and why you do it • Monitoring • Evaluation • Using your results. <p>In each section there are checklists.</p>

Social Enterprise

Title	A toolkit for developing a social purpose business plan
Developed by	Structured Employment Economic Development Corporation (Seedco)
Year published	2004
Developed for	Non-profit organisations
Available from	Seedco
Price	Free to download from the Seedco website
Approach	Social outcomes and business planning
Practical tools	Lots of tools and a business plan as an example
Use of case examples	Yes
Lists additional resources	Lots of worksheets and templates
Size	262 pages
Description	<p>This American toolkit is a step-by-step business planning guide for nonprofit organisations. It takes organisations through the planning process which highlights social components and social outcomes of the business. There are tools to measure, track and evaluate social outcomes.</p> <p>Part I of the Toolkit provides you with frameworks to think about business planning in general and your idea and organisation in particular.</p> <p>Part II of the Toolkit provides you with step-by-step instructions for developing your business and creating a written plan.</p> <p>Part III of the Toolkit provides you with a few extra resources to assist with the planning process.</p> <p>Part IV contains materials referenced in Parts I, II and III.</p> <p>Part V contains the full text of the an example business plan.</p>

Title	Proving and improving: a quality and impact toolkit for social enterprises
Developed by	Lisa Sanfilippo for New Economics Foundation
Year published	2006, updated 2009
Developed for	Social enterprises, but can be useful for any organisation bringing together elements of social, environmental and economic mission with income-generating strategies
Available from	New Economics Foundation
Price	Available from the New Economics Foundation website
Approach	Self-evaluation to improve quality and impact
Practical tools	One section provides information on a number of different approaches and models, and a resource section provides an indicator bank and an introduction to impact mapping.
Use of case examples	Some case examples are used as illustration.
Lists additional resources	Each approach lists details of where further information or support can be found.
Size	In three sections: <ul style="list-style-type: none"> • Knowledge: 45 pages • Tools: 86 pages • Resources: 44 pages
Description	<p>This toolkit aims to provide social enterprises with the knowledge, tools and resources they need to measure their quality and impact.</p> <p>The three books, wall chart and CD offer a starting point for any organisation interested in demonstrating quality, measuring outcomes and impact and being accountable to stakeholders.</p> <p>The pack includes:</p> <ul style="list-style-type: none"> • a participative storyboard and impact map activities • a guide to more than 20 proving and improving tools • a bank of outcome indicators • a CD-Rom primer on Social Return on Investment (SROI).

Title	The money trail: measuring your impact on the local economy using Im3
Developed by	New Economics Foundation
Year published	2002
Developed for	Organisations and communities concerned about their local economy and how effectively the different parts of that economy are working
Available from	New Economics Foundation
Price	Free to download from the New Economics Foundation website
Approach	Economic impact assessment
Practical tools	'How to guide' to using Local Multiplier x 3 (Im3). Additional blank surveys, flow charts and model power point presentations for stakeholders can be downloaded from the plugging the leaks website.
Use of case examples	Local Multiplier x3 is explained using simple analogies and through different worked examples, including government procurement of construction contracts in Norfolk and Merseyside; social enterprise in Cumbria and Sheffield; residents' access to finance in Leicestershire and Derbyshire; welfare benefit take-up campaigns in Lancashire and London.
Lists additional resources	No; some references given
Size	134 pages
Description	<p>This workbook is aimed at helping people look at how effectively different parts of the local economy are working, and the impact that their initiatives have on it. It is very practically based, providing clear explanations and worked examples.</p> <p>It provides a way of understanding what is currently happening in the economy: how money enters; the path it then takes in the area; and how it leaves.</p> <p>Written in plain English, this guide explains what local multipliers are, why it is useful to measure them and how to measure them.</p>

Substance misuse

Title	Basic principles of monitoring and evaluation for service providers
Developed by	Mark C Connelly, Lanarkshire Alcohol and Drug Action Team
Year published	2004
Developed for	Organisations providing drug and alcohol services
Available from	Drug Misuse Information Scotland
Price	Free to download from the Drug Misuse Information Scotland website
Approach	Self-evaluation
Practical tools	Templates for possible outcomes and indicators and a suggested format for writing an evaluation report.
Use of case examples	No, but examples are given of outcomes and indicators relevant to drugs and alcohol services.
Lists additional resources	No
Size	26 pages
Description	<p>The aim of the booklet is to provide guidance to service providers on the principles of monitoring and evaluation and to provide a template for planning, conducting and reporting on evaluation.</p> <p>The guidance document is based primarily on materials provided by Partners in Evaluation Scotland, who were commissioned by the Scottish Executive Effective Interventions Unit in 2002 to provide a Scotland-wide workshop series: 'Developing a clear strategy to improve monitoring and evaluation of drug and alcohol services in Scotland.'</p>

Title	Evaluation Guides 1 – 10
Developed by	Scottish Executive, Effective Interventions Unit
Year published	2001 - 2002
Developed for	Those working in the field of substance misuse, although some of the guides have more general application
Available from	Effective Interventions Unit
Price	Free to download from the Drug Misuse Information Scotland website
Approach	Self-evaluation
Practical tools	Minimal
Use of case examples	Examples from the substance misuse field are used for illustration in each of the guides.
Lists additional resources	Further resources are suggested in each of the guides.
Size	4 pages per guide
Description	A set of guides covering the following: Guide 1: Definitions and Common Concepts Guide 2: Planning an Evaluation Guide 3: Designing an Evaluation Guide 4: Implementing an Evaluation Guide 5: Reporting and Dissemination Guide 6: Designing an Economic Evaluation Guide 7: Using Assessment Data for Evaluation Guide 8: Evaluating Outreach Services Guide 9: Evaluating Employability Programmes Guide 10: Evaluating Community Engagements Guide 11: Evaluating Arrest Referral Schemes Guide 12: Intensive Interventions with Young People Guide 13: Supporting Carers and Families of Drug Users

Title	Getting to outcomes: promoting accountability through methods and tools for planning, implementation and evaluation
Developed by	Matthew Chinman, Pamela Imm, Abraham Wandersman for the US Rand Corporation
Year published	2004
Developed for	Those working in the field of substance misuse/abuse prevention
Available from	Rand Corporation
Price	Free to download from the Rand Corporation website
Approach	Incorporates traditional evaluation, empowerment evaluation, results-based accountability, and continuous quality improvement
Practical tools	Downloadable worksheets, including examples of surveys that can be used with different audiences. Also planning templates to address needs and resources assessment; set goals and objectives; consider capacity, planning, process, and outcome evaluation; continuous quality improvement; and sustainability.
Use of case examples	Different organisational examples to demonstrate the use of the tools
Lists additional resources	Additional resources and sources of support are listed; these are US based
Size	177 pages
Description	This manual provides a model for identifying outcomes in prevention practice. The ten-step process, outlined in the manual is aimed at enhancing practitioners' prevention skills while empowering them to plan, implement, and evaluate their own programmes.

Title	Monitoring and evaluating youth substance abuse prevention programme
Developed by	United Nations Office on Drugs and Crime (UNODC) and the World Health Organisation (WHO)
Year published	2006
Developed for	For workers in the field of youth substance abuse prevention.
Available from	UNODC
Price	Free to download from the UNODC website
Approach	Self-evaluation
Practical tools	No
Use of case examples	Examples of evaluation in practice to illustrate key points throughout.
Lists additional resources	Yes
Size	82 pages
Description	<p>This guide contains material on the importance of evaluation, the difference between monitoring and evaluation and how to plan an evaluation.</p> <p>Chapters 5 - 8 cover how to set it up, who to involve and how monitoring and evaluation fits within a project's cycles. There are also chapters on data collection and analysis.</p>

Title	Alcohol outcomes spider: scales and guidance notes
Developed by	Sara Burns for Alcohol Concern
Year published	2005
Developed for	It is designed to be used by workers together with their clients.
Available from	Alcohol Concern
Price	Free to download from the Alcohol Concern website
Approach	Outcomes
Practical tools	The Spider is a practical tool in itself.
Use of case examples	No
Lists additional resources	No
Size	26 pages
Description	<p>The Spider is a tool for measuring the outcomes of work with alcohol service users. Change is measured on 8 'legs': internal journey; social contacts; managing physical health; mental and emotional health; occupation; crime; family and alcohol consumption.</p> <p>Each leg is given 8 scale points, each of which is described to provide consistency of measurement.</p> <p>The booklet provides guidance for use of the Spider and highlights opportunities for training. It can be used as a record of change by individual service users and/or input into an IT system for analysis across the whole service.</p>

Volunteering

Title	Volunteering impact assessment toolkit: A practical guide for measuring the impact of volunteering
Developed by	Institute for Volunteering Research
Year published	2004
Developed for	Volunteering agencies
Available from	Institute for Volunteering Research
Price	Free to download from the Institute for Volunteering Research website
Approach	Self-evaluation
Practical tools	Sample questionnaires are included.
Use of case examples	Case study examples included
Lists additional resources	
Size	130 pages
Description	<p>The toolkit has been designed and tested to assess the impact of volunteering on volunteers, organisations, users and the community. Impact is measured as a change in five types of capital – physical, human, economic, social and cultural capital. Most of the toolkit comprises sample questionnaires (in print and on disc) and a ‘traffic light scoring system’ is tied into the questionnaires.</p> <p>The toolkit also explains the research process, secondary data, sampling, interviews, focus groups, volunteer diaries and data analysis in a brief and readable format.</p>

Title	LEAP for Volunteering
Developed by	Scottish Community Development Centre for Volunteer Centres Scotland
Year published	2003
Developed for	Volunteer centres. The model has also been developed with the potential to be applied by a range of different sorts of agencies that support, promote and engage volunteers and by volunteers directly.
Available from	Scottish Community Development Centre
Price	Free to download from the Scottish Community Development Centre website
Approach	Learning, Evaluation and Planning; Self-evaluation
Practical tools	No
Use of case examples	Example outcomes and indicators used
Lists additional resources	No
Size	98 pages
Description	<p>This planning and participatory self-evaluation tool was developed specifically for volunteer centres and other organisations engaging with volunteers.</p> <p>It covers: what is involved in volunteer development; identifying appropriate evaluation indicators; providing evidence of what has been done and the difference it has made.</p> <p>The document explains how inputs, processes, outputs and outcomes are interrelated through the planning/evaluation cycle. It proposes a five step approach:</p> <ul style="list-style-type: none"> • what needs to change? • how will we know if it has changed? • what inputs and processes will we use to make change happen? • did we use these as planned? • what changed (whether intended or not)? <p>A series of diagrams demonstrates how core purposes and dimensions of volunteering can be addressed using the LEAP framework.</p>

Creative tools

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Creative tools for engaging a range of stakeholders in monitoring and evaluation

Title	Involving People: a practical guide
Developed by	Voluntary Action Westminster
Year published	No date found
Developed for	Front line staff and managers of public services who want to improve services by talking to and involving the people who use them
Available from	Voluntary Action Westminster
Price	Free to download from the Voluntary Action Westminster website
Approach	Participatory: user involvement
Practical tools	Practical tools to involve people
Use of case examples	No
Lists additional resources	People to contact and more information for each tool plus useful reading and websites
Size	66 pages
Description	<p>This easy-to-read guide will be useful at the point where you are ready to choose a method to involve people.</p> <p>The guide is divided into 2 main sections:</p> <ul style="list-style-type: none"> • Ways of involving people – one-off • Ways of involving people – ongoing <p>The last section looks at supporting people in involvement.</p>

Title	Evaluation Cookbook: Updated Publication
Developed by	Angus McCabe, Katrice Horsley for the National Evaluation of the Children's Fund
Year published	2005, updated April 2008
Developed for	Anyone working with children and families
Available from	Routledge
Price	Available from the Routledge website
Approach	Participatory
Practical tools	Yes
Use of case examples	No
Lists additional resources	No
Size	64 pages
Description	<p>This is a valuable resource for those wishing to consult with children and families. It contains 21 participatory evaluation exercises for use with children, young people and families/community groups. Attractively and clearly presented, the exercises are easy to use and come with suggestions for use and instructions on how to create the equipment needed.</p> <p>These tools can be used in a variety of informal and formal settings and most of the exercises are suitable for use with disabled children or children with special needs, as well as people with English as a second language.</p> <p>The book also explores why, how and where participatory research and evaluation should take place and provides suggestions on how the findings can be presented in imaginative ways.</p>

Title	The Evaluation game
Developed by	The Scarman Trust
Year published	n/a
Developed for	Anyone wishing to monitor and evaluate their projects
Available from	The Scarman Trust
Price	The kit is part of a training package. Contact the Scarman Trust for more details.
Approach	General monitoring and evaluation
Practical tools	A monopoly style board game is used to introduce the importance of evaluation. The kit includes a range of tools such as a poster style evaluation to a professionally structured report.
Use of case examples	n/a
Lists additional resources	n/a
Size	n/a
Description	A kit to encourage people to monitor and evaluate their projects using a set of tools and templates enabling groups to evaluate their progress and impact. It is part of a training package.

Useful websites

Websites containing monitoring and evaluation resources	136
Websites providing information about online and published resources on monitoring and evaluation	142

Websites containing monitoring and evaluation resources

The Evaluation logic model	<p>The website provides several templates for logic models as well as sample examples. It also comes with a teaching and training guide for beginners.</p>
CYFERnet Search	<p>An online interactive tool for evaluation of programmes. It comes with evaluation tools and methodologies, types of evaluation, logic models and other information relevant to evaluation in practice.</p> <p>There are sample questions to test knowledge, video links to further explanations by evaluation experts and many other useful tools.</p>
USAID Monitoring and evaluation tips and resources	<p>USAID's TIPS series provides practical advice and suggestions on issues related to performance management and evaluation. Additional evaluation resources are provided in the portal. All publications within it are free to download.</p> <p>Publications include the following:</p> <ul style="list-style-type: none"> • Preparing an Evaluation Statement of Work • Evaluation SOWs: Good Practice Examples • Conducting Mixed Method Evaluations • Using Rapid Appraisal Methods • Conducting Key Informant Interviews • Using Direct Observation • Techniques • Constructing an Evaluation Report • Selecting Performance Indicators • Baselines and Targets • Data Quality Standards • Conducting Data Quality Assessments.

[Participatory Planning Monitoring and Evaluation \(PPME\) Resource Portal](#)

This website is developed by Wageningen UR Centre for Development Innovation. The portal aims at helping to build the capacity of individuals and organisations to effectively implement PPME systems.

The first section of the portal provides an introduction to ‘Theories and Backgrounds’ and ‘Methodologies and Approaches’ in Monitoring and Evaluation (M&E).

Some methodologies discussed include but are not limited to the following:

- logical framework approach
- participatory learning and action
- evaluative inquiry
- stakeholder analysis
- a section on tools and methods also provides a comprehensive list of tools used in M&E.

The tools mentioned on the portal are discussed in detail with examples and diagrams. Some of the tools listed include:

- focus groups
- matrix analysis
- questionnaires and surveys
- SWOT analysis
- evaluation wheel
- venn diagrams

There is a section on the use of video technology to conduct evaluation with links to sample past evaluations.

The remaining section provides a range of links to documents addressing a number of topics in monitoring and evaluation.

[Community Evaluation Northern Ireland \(CENI\)](#)

The website contains a publications catalogue listing over 200 titles, including evaluation titles and contains links to other useful websites. It also has an FAQ section on monitoring and evaluation.

<p><u>Charities Evaluation Services (CES)</u></p>	<p>CES provides information, advice and training on quality and evaluation systems for the voluntary sector and community sector and its funders.</p> <p>The website answers some basic questions:</p> <ul style="list-style-type: none"> • What is monitoring? • What is evaluation? • Why evaluate? <p>There is a range of other downloadable resources and details of training and further publications available to help organisations with their monitoring and evaluation.</p> <p>Free downloadable publications include <i>Your Project and its Outcomes</i>, <i>Next Steps: Monitoring and Evaluation on a Shoestring</i> and <i>Assessing Change: Developing and Using Outcomes Monitoring Tools</i>.</p>
<p><u>Evaluation Support Scotland (ESS)</u></p>	<p>Evaluation Support Scotland provides specialist support across Scotland to voluntary organisations and their funders to help them to evaluate and learn.</p> <p>The website contains downloadable support guides on various aspects of monitoring and evaluation:</p> <ul style="list-style-type: none"> • Clarifying your aims, outcomes and activities • Developing and using indicators • Using interviews and questionnaires to evaluate your project • Using visual approaches to evaluate your project • Using photographic technology to evaluate your project • Using audio and communications technology to evaluate your project • Getting the best from external consultants. <p>It also includes downloadable tools for planning your evaluation and collecting information and a resource pack for befriending and mentoring organisations.</p>

<p>Homeless Outcomes</p>	<p>This website, published by London Housing Foundation as part of its outcomes programme, has been developed to provide a one-stop resource for homelessness agencies who are interested in taking an outcomes approach to their work.</p> <p>It includes material to help agencies develop and deepen their understanding of the outcomes approach and includes the Outcomes Star, a tool for measuring the outcomes of work with homeless people.</p>
<p>Inspiring Impact</p>	<p>Inspiring Impact is managed and delivered by eight third sector organisations. These include membership bodies to ensure it is owned by the sector, and impact measurement specialists to reflect best measurement practice.</p> <p>The Inspiring Impact has a number of resources designed to improve the measurement of impact by charities and social enterprises. These include a Code of Good Impact Practice and a diagnostic system, Measuring Up, to help organisations identify what they need to do to improve their impact measurement. This includes questions to help assess how well their current measurement practices suit their needs, what actions are needed to improve impact practice, and what particular approaches and tools may be useful.</p>
<p>Intrac</p>	<p>Intrac is a nonprofit organisation working in the international development and relief sector. Its resource database contains a wide range of resources on international development.</p> <p>There are a range of resources available on research and approaches, evaluation and impact assessment.</p>
<p>Monitoring and Evaluation News</p>	<p>This website is particularly relevant to international aid and development organisations. It provides a link to the mande news mailing list, providing information on methods, tools and approaches. It also links to the Most Significant Change e-group and to other specialist monitoring and evaluation websites.</p>

Outcomes star	<p>The Outcomes Star™ is a suite of tools for supporting and measuring change when working with people. There are 19 versions of the Outcomes Star adapted for different client groups and services, including older people, mental health, families, and work. Versions of the Outcomes Star are available to download and view from the website. The Star Online web application and implementation packages are also available.</p>
Proving and improving	<p>The quality and impact toolkit website for social enterprises. The website provides personalised advice through the 'my toolkit' section where organisations can get a diagnosis and suggestions of actions they can take straight away. The 'my impact map' helps you start measuring what matters.</p> <p>There are practical tools and guides to download and a 'tools chart' to help you compare approaches.</p>
Resources for Methods in Evaluation and Social Research	<p>This site links to online books, manuals and guides about evaluation and social research methods, such as surveys, observations and others. There are also links to sites about data quality, statistical analysis, and free software such as statistical, office suites, spreadsheets and more.</p>
United Kingdom Evaluation Society (UKES)	<p>The UKES exists to promote and improve the theory, practice, understanding and utilisation of evaluation and its contribution to public knowledge and to promote cross-sector and cross-disciplinary dialogue and debate.</p> <p>The website provides good practice guidelines for evaluators and has an online resource giving links to other useful publications or organisations working in the field of monitoring and evaluation.</p>

[The Urban Institute: Center on Non-profits and Philanthropy](#)

The Center on Nonprofits and Philanthropy, along with the Center for What Works, in the US, has developed a common outcomes framework to help standardise approaches to performance measurement in the non-profit sector.

This framework provides outcomes and outcome indicators in 14 program areas.

- Adult Education and Family Literacy
- Advocacy
- Affordable Housing
- Assisted Living
- Business Assistance
- Community Organising
- Emergency shelter
- Employment
- Training
- Health Risk Reduction
- Performing Arts
- Prisoner Re-entry
- Transitional Housing
- Youth Mentoring
- Youth Tutoring

For each program, there is a sample mission statement, an outcome sequence chart, a table of candidate program-specific outcomes, and data collection strategies with suggested data sources for each outcome indicator.

All the information is [available to download](#).

Websites providing information about online and published resources on monitoring and evaluation

Evaluation Support Scotland	This site provides an excellent section on published and online toolkits and guides, with brief descriptions of each one. The resources are grouped within subsectors.
Staff educational development association (SEDA)	This site provides a list of online publications including tools for assessment, guidance notes on carrying out evaluations and other online publications.
United Kingdom Evaluation Society (UKES)	This page on the UKES website has a section on online resources such as publications, toolkits and useful organisations.
The Urban Institute: Center on Non-profits and Philanthropy	This page of the website includes additional online resources on outcome measurement.
University of Dublin, Centre for Nonprofit Management	This site contains a set of practitioner papers on different aspects of evaluation. It also has a very useful bibliography on nonprofit evaluation.