

ANNUAL REVIEW 2004



**Building on**  
our **strengths**



# Building a stronger voluntary sector

## Our mission

Charities Evaluation Services is committed to increasing the effectiveness of the voluntary sector by developing its use of evaluation and quality systems.

## With thanks to our funders

We would like to thank our funders for their help and support:

The Active Community Unit,  
The Home Office

Barclays

The Baring Foundation

Big Lottery Fund

The Bridge House Trust

Centrica plc

The City Parochial Foundation

Comic Relief

EC1 New Deal for Communities

The Wates Foundation

## Contents

- 2 Our mission
- 2 Thanks to our funders
- 2 Introduction: Building a stronger voluntary sector
- 4 Strengthening individual organisations
- 6 CES' work with funders
- 8 Strengthening the wider voluntary sector
- 9 National outcomes programme
- 10 PQASSO licensed mentor programme
- 12 Our services in 2004
- 14 Approach to quality
- 15 Publications
- 16 Looking to 2005 and beyond: CES and the national performance improvement hub
- 17 Trustees, staff, associates and clients
- 17 Annual review acknowledgements
- 18 Summary financial information

CES' role within the voluntary and community sector is unique. For the last fifteen years, we have been at the forefront of performance improvement, combining expertise in evaluation and quality assurance with practical know-how.

Our key strength lies in translating theoretical approaches to improving organisational effectiveness into practical and affordable methods appropriate to voluntary organisations of all sizes and stages of development. In this way, CES provides a crucial bridge between academic and community-based evaluation.

## Helping to strengthen individual organisations

Individual charities and community organisations are looking for ways to improve their effectiveness which are responsive to the needs of their users and command the support of current and potential supporters. For organisations getting to grips with performance improvement, good

preparation and access to training and ongoing support can be vital for success. CES provides a range of services in response, including

- training
- consultancy and technical coaching
- external evaluations
- PQASSO, the quality system created specifically for small organisations and projects, and
- a range of publications, pitched at varied levels for organisations at different stages of development.

Throughout 2004, CES worked with a

hugely diverse range of voluntary organisations across the UK. Over 900 organisations attended our training courses, and we were able to provide training free of charge to refugee community organisations based in the Midlands and North of England.



Colin Nee Chief Executive

Working with organisations to improve the quality of their work was a core feature of our programme in 2004. We supported agencies and networks wishing to implement PQASSO and other 'off-the-shelf' systems, as well as helping those wishing to create their own bespoke quality systems.

Our consultancy and external evaluations brought benefits not just to those commissioning the work but increased our own capacity by bringing fresh learning and innovative methodologies into the organisation. We worked on 22 external evaluations and consultancy projects, many of them strategically important for the sector.

Thousands of organisations received our Plain English publications, allowing CES to expand its reach and offer guidance to much larger audiences.

Our work with individual voluntary and community organisations gives us hands-on experience of the practical dilemmas they face, as well as a unique vantage point from which to capture and analyse organisations' support needs, and to disseminate what we learn.

### Helping to strengthen the sector as a whole

The focus on effectiveness in the sector has sharpened considerably in recent years and this has been reflected in a growing demand for support in developing new skills and techniques.

#### Partnerships with support networks

In order to respond strategically to this new environment, CES has sought to amplify its national reach by developing a 'cascade' approach working in partnership with infrastructure networks such as the CVS movement and specialist 'sub sectors'.

Through this approach we aim to embed sustainable sources of support within partner networks throughout the voluntary sector. Our national outcomes programme is the most current – and ambitious – example. CES is recruiting, training and supporting 75 outcomes 'champions' based within development agencies and specialist

BME networks. The champions will go on to offer training and ongoing support to several hundred frontline agencies based within their networks.

#### Sharing learning

At the national level, our links with Government and major sector funders enable us to place the advice and support that we offer individual organisations within the broader policy context which increasingly stresses the need for voluntary organisations to identify and report on their achievements, and to learn from how they have been achieved when planning changes to service delivery.

Our experience is utilised to influence Government policy and major funders' strategies with regard to performance improvement, highlighting the particular needs of less well-resourced agencies.

#### Change Up performance improvement hub

Over the next few years, CES' cascade approach to expanding access to support will be a key feature in the work on the national hub of expertise on performance improvement. CES will co-lead the hub partnership, taking particular responsibility from 2006 onwards for training a network of performance improvement advisors able to offer personalised support in performance diagnosis and improvement planning.

We hope the following pages illustrate the value of CES' work. The opening pages focus on the support we offer to individual community organisations working directly with disadvantaged communities. The second half of the report focuses particularly on how we build the capacity of second tier networks to support those at the sharp end.

All of this work would be so much harder without the dedication and energy of our trustees, staff and associates. We look forward to your continued support over the coming years as CES' unique range of services are needed more than ever before, helping voluntary and community organisations however poorly resourced to illustrate through their work the enormous added value that the sector brings to communities across Britain.

# Strengthening individual organisations throughout the UK

CES offers a unique range of services to a wide range of clients. Our services include consultancy, training, publications and advice.

**Consultancy** at CES takes many forms, including external evaluations, developing quality systems and writing publications. Our external evaluations help commissioning charities answer their evaluation questions and give recommendations for action.

Crisis, for whom CES undertook a programmatic evaluation, commented that:

"The work was professionally carried out to a high standard. We found [the CES consultant] very easy to work with and were impressed with the diligence in the research of many years' worth of information."

Our work creating bespoke quality systems enables commissioning organisations to create practical and robust systems to ensure they are meeting their own standards. Home-Start described this experience:

"The work went very well and was undertaken professionally, sensitively and diligently. Once incorporated into our practice the quality assurance system will be an integral part of the management of schemes and Home Start National. It should have a lasting impact."

CES has a well-established reputation as a provider of high quality **training**, on monitoring and evaluation and quality systems. Our approach is participatory and practical, closely tailored to clients' needs. We have a highly skilled training team, able to deal with complex content and a range of participants. The commissioner of a bespoke training course commented:

"Your training style was superb. I haven't seen anyone deal quite so well with the questions and challenges raised by members of staff."

## Case example: The National Assembly for Wales: consultancy to research and write guidance

The National Assembly for Wales commissioned CES to write guidance for Welsh homelessness service providers on how to consult with homeless people. *Consulting With Homeless People* was published in 2004 in both English and Welsh.

In developing this practical guide, CES:

- carried out a literature review
- interviewed 30 homelessness service providers
- ran focus groups with users of homelessness services, and
- consulted providers on the form of the guidance.

Following this work, the Assembly commented that:

"[CES] demonstrated considerable expertise and commitment to the project. All stages were managed to time and the final outputs were of a very high standard."

Identifying and sharing best practice, the publication has an important role to play in improving the relevance and effectiveness of services for homeless people by drawing on the experiences of those with most at stake – homeless people themselves.



“Working with quality systems makes organisations begin to value the importance of monitoring and evaluating their service as well as delivering it. They also begin to value themselves more.”

**Gerry Gross**

Quality Development Officer,  
Voluntary Action Sheffield

CES publishes a range of practical **publications** on evaluation and quality. We publish our own quality system, POASSO. We have also written a range of publications for clients, particularly large sector funders.

We deliver a significant amount of free work to clients. Often this is technical support to help clients implement a new system. We also signpost to relevant organisations and resources.

“The evaluation provides a blue-print for sharing learning and practice. It gives hard evidence of achievements – useful for appraisals of work and areas for attention. We will use the report to help other parts of the Council use our approaches.”

**London Borough of Camden**

**CES’ clients**

Our clients are a diverse cross section of the voluntary and community sector. For example, of the 1,500 people we trained last year:

- 25% were from infrastructure organisations
- 20% were sector funders
- a range of responsibilities was represented – administrators, front-line workers, chief executives, management committee members and volunteers
- 90% of our clients were voluntary sector staff and volunteers; most were from small or medium sized organisations, with a third coming from larger ones
- 70% were from England, with roughly 10% each from Northern Ireland, Wales and Scotland.

# CES' work with funders

## Case example: Kent and Medway Pre-School Learning Alliance: self-evaluation training

The Pre-School Learning Alliance supports pre-school service providers in the non-maintained sector. In 2004, two of their staff members attended CES' foundation course in monitoring and evaluation. The two staff members were really enthused by the training, and reported 'huge' increases in their confidence, knowledge and skills. Very quickly they implemented changes in their organisation. They:

- developed evaluation frameworks for their three service areas
- developed a simple evaluation tool
- reduced existing monitoring by cutting out aspects they no longer needed.

These changes:

- have helped them focus on what they are doing and why
- have helped them look closely at their real data needs
- will give them user feedback for the first time
- will help with future funding bids.

We were recently commissioned by the National Lottery to write 'Your project and its outcomes' and then by the Association of London Government (ALG) to adapt this publication to produce 'Measuring up'. Both these publications are free to download from their respective websites.

"Excellent course, very well presented. I really understood the main quality marks by the end of the session. I feel I have now a very good understanding of the different systems and the choices we need to make."

**Quality training participant**

Funders of voluntary organisations are increasingly keen to improve their understanding of monitoring and evaluation and to lessen the burden placed on funded organisations when it comes to accountability. To this end, CES has worked with numerous statutory, independent and corporate grant-makers in various ways.

### Consultancy

We have helped funders to create their own monitoring and evaluation systems as well as undertaking independent evaluations of their systems.

### Publications

CES carried out a study on behalf of the National Audit Office for their audit of the National Lottery Charities Board. This led to a publication entitled 'Does Your Money Make a Difference? a practical self-assessment tool for funders' (CES, 2001). This publication forms the basis of our one-day course in monitoring and evaluation for funders.

## Monitoring and evaluation for funders course

Reporting to funders takes time, energy, effort and often mental gymnastics, as different funders ask different questions, in different ways, at different times. Participants on our courses who are often funded by a range of funding bodies regularly ask when funders are going to be educated about monitoring and evaluation. CES designed 'monitoring and evaluation for funders' in response to this issue. The aims of the course are to increase funders' understanding of:

- what they need to know and why
- what information it is reasonable to ask for and feasible to collect from funded groups
- how to implement an appropriate monitoring and evaluation system, and
- how to use the information they collect from the groups they support.

### Case example: Training and support in outcome monitoring for funded and funders in Sandwell Metropolitan Borough Council

Building on Sandwell Council's own work on evaluation, CES provided training and support to community centres and their funding officers during 2004.

The fact that the funding officers and funded groups undertook joint training was an important and courageous initiative that facilitated dialogue and enhanced understanding between the two:

"the funding officers and funded groups have learnt together, have shared the starting point and common experience... so that acts as support."

After the training, CES provided follow-up support to the trainees. This included commenting on outcome monitoring frameworks and assisting the client to develop a 'framework for measuring performance' that spans work done with specific target groups as well as across specific areas. This framework is due to be

piloted by the client and aspects will enter the Service Level Agreement between funders and funded groups.

Speaking to the client some months later to see how things had progressed, some of the key outcomes shared were that:

"there are firm relationships – very supportive – which is how we want to be – we want projects to succeed... They [community centres] also have each other meet every couple of months. Some relationships started during the training so can get peer support. So we need to foster this more."

Another outcome is that 'performance improvement' is continuously on the agenda: "even if it's not always called this! I don't want this to mean doing more. It might be about doing things differently or more efficiently."

So far, we have trained over 30 funding organisations.

"The course covered all relevant points and brought up new ideas which we could implement in our grant making."

**Funder**

"The course has validated some of my thinking, but has also made me question some practices and has given a focus for the future development of monitoring and evaluation."

**Funder**

#### Useful information sources:

Department for Work and Pensions 'Lead funder' project [www.dwp.gov.uk/leadfunder](http://www.dwp.gov.uk/leadfunder)

HM Treasury's Guidance for Funders [www.hm-treasury.gov.uk](http://www.hm-treasury.gov.uk)

"We found CES worked well with us. They were consultative and listened to our views and perspectives and at the same time offered constructive advice."

**DEA**

#### Training

CES provides training both for funded groups and funding bodies. For example, for over nine years we have provided self-evaluation training to all organisations receiving grants from the BBC Children in Need Appeal. We also run outcomes training for all groups funded by the Association of London Government as well as bespoke training for ALG grant officers.

# Strengthening the wider voluntary sector

## Minimal resources leading to large returns: CES' cascade approach

In addition to supporting individual organisations, CES seeks to strengthen the wider voluntary sector through the services we offer.

In order to maximise our own impact, we have developed a cascade approach for a number of our larger projects. The approach involves training intermediaries who can in turn disseminate their learning to other organisations by providing them with training and support. The intermediaries generally have a longer-term involvement with the organisations they work with and this enables those organisations to receive their training and support in a sustained way that not only builds and supports their capacity but allows learning to become embedded.

## Why cascade?

This way of working allows CES to get the most from our own capacity by meeting more of the demand for support from within the sector than we could acting alone.

We can also significantly increase the pool of individuals and organisations across the sector with the skills and confidence to train and mentor grassroots organisations. By using a cascade approach, we can reach groups with very low internal capacity and overcome financial and geographical barriers. The cascade approach also benefits CES encouraging greater productivity within our own staff and associate team. The net result is increased knowledge and understanding within the voluntary and community sector.

CES ran two significant cascade programmes during 2004 that operated on a national level in the areas of outcomes and quality: the National Outcomes Programme and the PQASSO Licensed Mentor Programme. The National Outcomes Programme is now in the second of its three years and is beginning to generate exciting results. Our PQASSO Licensed Mentor Programme aims to ensure that high quality support for those who have chosen to implement PQASSO is available from local sources as well as directly from CES.



“One impact of the outcomes programme has been excitement, motivation, clarity and embracing of the concepts within the black minority ethnic refugee sector.”

### **Kristine Wellington**

Funding Development Officer,  
Hackney CVS

## The National Outcomes Programme

This flagship programme is in its second year and continues to generate excitement in the voluntary sector. It has reached its target of recruiting 75 outcomes champions representing nine English regions plus the rural, volunteer development and BME sub-sectors. We are well placed to exceed the programme's other key target of delivering training on an outcomes focus to 500 voluntary and community organisations.

Based on a cascade approach, the champions receive training from CES on outcomes and how to train others in using an outcomes focus. We also provide the champions with resource materials and access to ongoing mentoring. On completing training, the champions are equipped with the skills and materials to deliver outcomes training to grassroots organisations in their networks.

The Open University has been working with CES from the outset to evaluate the programme and disseminate the learning to policy makers and others throughout the sector.

### Early data is encouraging:

- 94% of outcomes champions agreed they had the skills to successfully train and support others in using an outcomes focus, and
- 98% agreed they had the knowledge and confidence to do this.

## Interview with Sofia Roupakia Southwark Action for Voluntary Organisations (SAVO) (Outcomes Champion)

### What have you gained from your involvement with the programme?

"The programme has given me a greater understanding of how you assess your work and its effect on the people you work with. Since becoming an outcomes champion I've developed my presentation and facilitating skills through delivering training to other voluntary organisations. I particularly enjoyed the participatory nature of the course which I feel brings far greater benefits to the participants."

### Talking of the frontline organisations you've trained under the programme, what has been the impact you had on them?

"They were all very excited by the content of the course. They all came away understanding the concept of an outcomes focus although some struggled and required further support around developing their outcome indicators. It was particularly enlightening working with newer organisations who were more open to taking on a new approach to their work. It was great putting them on the road to identifying their own outcomes – rather than repeating past experiences of 'chasing pots of money' and making their work fit funding criteria."



Turning to the voluntary organisations subsequently trained by outcomes champions, when asked whether they now have the tools and understanding to begin introducing an outcomes focus in their own organisations, 97% agreed.

According to the first annual report from the external evaluators at the Open University:

"we have no hesitation in applauding the achievements to date of all the staff involved... the programme is on course to deliver the intended results."

### PQASSO Licensed Mentor Programme

The PQASSO Licensed Mentor scheme enables CES to enhance the quality of support available to organisations that have chosen to implement PQASSO.

The programme was first developed when CES trained groups of Council for Voluntary Services staff to provide training and follow-up mentoring support to local voluntary and community organisations across England. This programme demonstrated that mentors could provide effective training and support once they themselves had received adequate training.

Our new training and licensing programme has a wider reach and has been designed for

those whose role is to provide training and support to local voluntary and community organisations implementing PQASSO.

Applicants for licensed mentor status are assessed before being accepted on to the training programme. Those selected receive training in the use of PQASSO and the skills and techniques to support organisations using the system. Licensed mentors are authorised to use the CES training pack and also have access to ongoing mentoring training, support and information from CES.

“As a PQASSO mentor I have supported many organisations in making significant improvements. Yes, sometimes it can be a challenge, but it is a great learning experience for all involved. I am sure that our pursuit of quality will ultimately lead to the strengthening of the sector as a whole.”

#### **Sabina Talib**

Derbyshire Learning and Development Consortium



### Case example: Voluntary Action Westminster

One of our licensed mentors, Fiona Gaffa, described how the course dovetails well with her role as one of Voluntary Action Westminster (VAW)'s Capacity Building Officers.

Following a training needs analysis undertaken by her team with over 100 local groups in Westminster, and gaining her PQASSO mentor licence, Fiona has developed and run PQASSO training courses which, to keep up with high demand, now feature regularly on the VAW training programme. She has used the training manual and various exercises from the course on her own PQASSO training courses.

Fiona identified improvements in her communication, training and facilitation skills as she progressed through the CES training and licensing programme:

"The course was extremely useful, covering a wide range of issues and strengthened my prior knowledge and understanding of PQASSO. I have gained a great deal of confidence to take PQASSO forward."

Organisations have left Fiona's training courses with a full understanding of the self-assessment approach which is key to PQASSO's implementation and with enthusiasm to get started. VAW has since become involved with an ESF funded project via Central London Learning and Skills Council. The project, delivered by seven London CVS, assists a number of organisations to work towards level 1 of PQASSO. As a licensed mentor, Fiona is perfectly placed to deliver this one to one support and to meet the high level of demand for PQASSO in the City of Westminster.

"I have been really impressed – this is the least confusing monitoring and evaluation training I have come across. A great balance of listening and doing."

**Evaluation training participant**



"To me, PQASSO is like a Swiss army knife with 12 tools, each appropriate to a particular task or situation. The 12 PQASSO quality areas help an organisation to strengthen and develop all of its essential processes and practices that will enable it to manage and improve its support and services."

**Peter Smith**

Community Projects Manager, PACE  
(Practical Awards Community Excellence)

# Our services in 2004

CES' approach is to offer unbiased, pragmatic and practical advice and support in choosing, implementing and sustaining initiatives to improve performance. As a medium-sized charity we understand the needs of, and demands on, the organisations we work with. Our services have been tailored in order to reflect this understanding:

## We offer

- free advice, customised information packages, assessment and referral
- free technical coaching for small organisations
- occasional free customised training programmes for small community organisations serving marginalised communities
- subsidised 'open' training in self-evaluation and quality assurance
- 'in-house' training in self-evaluation and quality assurance
- mentoring programmes for infrastructure organisations
- consultancy, research and external evaluations
- a wide variety of publications
- promotion and dissemination of research and good practice.

Organisations often need support in order to establish not only what is working well but also to identify areas which may benefit from change or improvement. Facing these challenges can be daunting but when done well, organisations are left with a powerful tool for reviewing and assessing progress, negotiating and communicating with funders, as well as motivating and engaging staff and volunteers. The training and support CES offers voluntary agencies helps them to put the right systems in place and to demonstrate that they are healthy, developing and learning organisations.

## Training

Training is one of CES' core activities. All courses are designed to enable organisations to develop key skills in an environment that nurtures learning and information sharing. During 2004, as part of our open and in-house training programme we trained 1,521 participants from 911 organisations.

"I went away with an action plan for implementation and a good idea of the resources required to carry out that plan."  
**PQASSO training participant**

"My knowledge in monitoring and evaluation has enhanced. I am a lot more confident than when I came in. The acquired skills will be beneficial to my organisation and to our members and service users."  
**Monitoring and evaluation training participant**

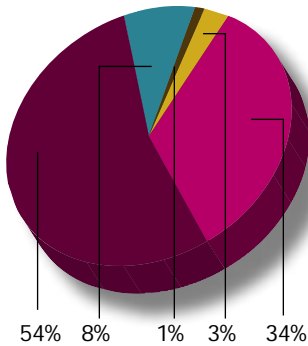
"The two days of training provided me with the necessary skills to implement PQASSO."

**PQASSO training participant**

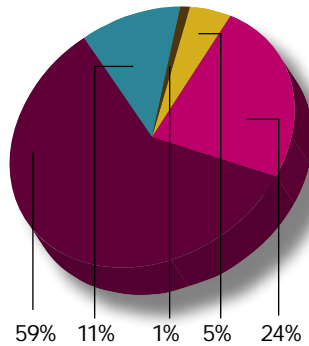
"The course de-mystified outcomes. I now have the knowledge to set up an outcomes monitoring system in my organisation."

**Outcomes training participant**

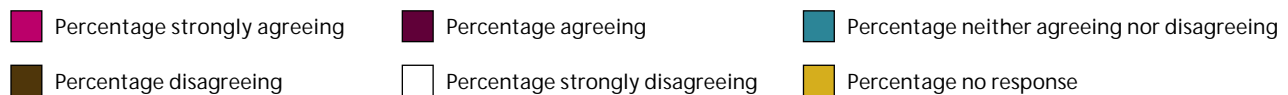
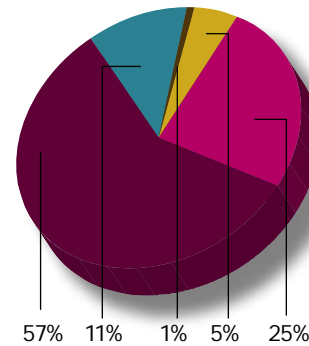
**Trainees who were more confident about implementing an evaluation or quality system following training**



**Trainees who felt the training will help their organisation to be more effective in meeting users' needs**



**Trainees who believed that the training would improve their services**



**Outcomes interviews**

We carry out outcomes interviews with a sample of trainees approximately six months after they have received training in order to gauge whether and how our courses are making a difference. Our questions aim to assess changes in participants' knowledge and understanding, confidence and ability to implement evaluation or quality systems at both individual and organisational levels. We are also interested to know about any factors, other than our training, that had contributed to these changes or acted as barriers to implementation. Key findings from 2004 include:

**Individual benefits:**

- 67% of trainees had already begun improving their systems or creating new ones
- 94% of trainees had increased their knowledge and understanding.

**Organisational benefits:**

- 67% felt there was a more positive approach to monitoring & evaluation or quality
- 67% felt there was a sharing of knowledge and skills
- 39% had started re-thinking service delivery.

**Consultancy**

During the course of 2004, CES completed 15 contracts and worked on 22 consultancy or external evaluation projects. User evaluation data demonstrates that with the right level of support, real improvements occur.

CES continues to work with a wide variety of organisations. Support is tailored to maximise results whilst addressing specific organisational needs. Key projects included the development of a bespoke quality assurance system for Home-Start and the production of a publication for the Association of London Government on outcomes measurement.

**Free support**

CES consultants and trainers offered free, tailored support and advice to around 170 organisations during 2004.

**Publications**

Publications continue to be a vital tool for making information widely available. Over 4,500 copies of CES publications were sold or provided free. In addition, 3,500 copies of free publications were downloaded from the CES website.

# Approach to Quality in 2004

## Quality systems strengthening organisations

CES provides consultancy, training, conferences, advice and information on the quality systems in use in the sector. We have also created our own system, PQASSO, the practical quality assurance system for small organisations.

### Consultancy

As familiarity with quality systems continued to grow, we helped organisations to develop their own systems. At National Mind, for example, CES reviewed the established system to look for ways of strengthening it. We also worked with Home-Start to build on the quality system they already had, helping them create and embed a more comprehensive system.

### Case example: a new quality system for Home-Start

CES was commissioned by Home-Start UK to review the practice standards which underpin the support to families offered by Home-Start schemes throughout the UK.

It was agreed that a quality assurance system should be developed which would form an essential part of the agreement between Home-Start UK and local Home-Start schemes.

CES developed a bespoke system, incorporating the ethos and best practice of Home-Start and the essential elements of nationally recognised quality systems, including PQASSO. For the first time, common standards would be shared by the national body and local schemes, with detailed criteria relating to the specific functions of the national and local organisations. While the new system would bring greater levels of consistency and mutual accountability, a combination of self assessment and a three-year cycle of external reviews would bring a greater emphasis on local schemes taking charge of quality themselves.

Home-Start launched the new system twelve months after recommendations for change were agreed. The best possible chance for buy-in to the new standards and processes was gained through wide consultation by Home-Start and CES throughout the feasibility and development stages, through working closely with a committed steering group, and finally through a cascade training programme which would ensure all in Home-Start were ready to implement the new system.

## Training on quality

CES provided training on choosing a quality system, on the Excellence Model and on PQASSO. Demand for PQASSO training remained particularly high, often tailored for the specific organisation and delivered in-house.

Overall, our training on quality reached 448 organisations in 2004.

## Quality conferences

CES started the first annual quality conferences in 1994 and now runs them jointly with NCVO. The 2004 conference provided a unique opportunity to hear experts impartially describe the main systems enabling comparison:

"I am now better equipped to make a choice."

"Really informative and focused."

"A real eye-opener! It cleared many doubts about quality systems."

## PQASSO

PQASSO (the practical quality assurance system for small organisations) remains the 'industry' standard.

- 9,000 copies sold
- 4,000 organisations and networks have bought the system
- the leading quality system created by and for the voluntary sector.

Working through the 12 quality areas, the organisation can readily see its strengths and where to improve. Organisations tell us that they find PQASSO accessible and that it strengthens their work.

"PQASSO has given the whole organisation a health check."

Not only does it strengthen individual organisations, it helps take the sector forward. Funders are ever more conscious of its value and often encourage the organisations they fund to use it. Learning and Skills Councils in various parts of the country are investing in training on PQASSO for small voluntary organisations.

# Publications

Over the years, CES has developed considerable experience in producing publications offering clear, accessible guidance on monitoring and evaluation and quality. CES' publications, ranging from toolkits to discussion papers, offer back up to people attending training courses, and provide stand alone information to a much wider audience.

Our basic booklets are available as free downloads on our website, and we have a new series of **Guidance papers** that address topics of general enquiry, such as **Costing an Evaluation** and **Preparing an Evaluation Brief**.

**PQASSO**, CES' practical quality assurance system for small organisations, first published in 1997, is now used very widely in the sector.

CES has further responded to increased demands on the sector to demonstrate quality and effectiveness by producing a number of new publications that aim to provide information to meet different needs. **Practical Monitoring and Evaluation: a guide for voluntary organisations** provides a comprehensive introduction to monitoring and evaluation for organisations at different levels, while the **First Steps** booklets give 'entry level' information on evaluation and quality.

In 2002, CES and the Community Fund produced **Your project and its outcomes**, reflecting the increased emphasis on outcomes. CES followed this booklet, which has been enormously popular, with **Managing outcomes: a guide for homelessness organisations**, providing more detailed guidance on applying an outcomes approach.

In 2005, a new discussion paper will be published on **Impact assessment**.

## **Practical Monitoring and Evaluation: a guide for voluntary organisations**, by Jean Ellis

CES is producing a second edition of this comprehensive guide and practical toolkit. The new edition develops the sections on outcome and impact monitoring, bringing the guide absolutely up to date in terms of addressing key areas of performance improvement that voluntary and community organisations need to understand. The guide is designed to be relevant to organisations approaching monitoring and evaluation for the first time, as well as for those needing a more advanced level of information.

## **First Steps in Quality and First Steps in Monitoring and Evaluation**

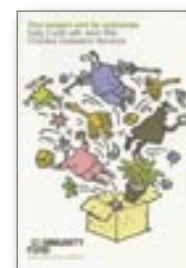
These two basic guides are targeted at charities and community organisations that are looking at quality and monitoring and evaluation for the first time. Written in plain English, they aim to demonstrate the benefits of approaches to quality and monitoring and evaluation, and introduce the first practical steps that organisations can take.

What others have said about First Steps to Monitoring and Evaluation:

"We intend to use this book as a working guide to all our projects as we develop."  
"The way that you simplify every step is very commendable."

## **Managing outcomes: a guide for homelessness organisations**, by Sara Burns and Sally Cupitt.

This very popular guide was developed by CES as part of the London Housing Foundation's 'Impact through outcomes' programme. Although written primarily for homelessness workers, it is useful for anyone involved in front-line work with service users wishing to adopt an outcomes approach.



# Looking to 2005 and beyond

## CES and the ChangeUp national performance improvement hub

2005 is set to be a watershed year for CES. While continuing to refine and improve our core services – training, information, consultancy and external evaluations – we will be ensuring that the fledgling ChangeUp national performance improvement hub gets off to the best possible start.

### What do we mean by performance improvement?

For us, 'performance' is the extent to which any voluntary organisation achieves its mission and furthers its cause. Improving performance is therefore about achieving your mission more effectively. It is about improving the quality of your services and achieving better outcomes.

### What is the performance improvement hub?

The performance improvement hub is one of six national hubs being established under the ChangeUp programme to upgrade infrastructure support in the voluntary sector. The other national hubs cover governance, workforce development, ICT, funding and volunteering. The six hubs are intended to work with and through regional and local infrastructure to improve the support available to frontline voluntary and community organisations throughout England.

### Who's involved?

Each national hub is a partnership of organisations with expertise in that area of work. CES is the accountable body for the performance improvement hub and will jointly lead it with NCVO. Our partners in the project are:

- British Association of Settlements and Social Action Centres (BASSAC)
- Black Training and Enterprise Group (BTEG)

- National Association of Councils for Voluntary Service (NACVS)
- New Economics Foundation (NEF).

### What will it do?

There are many approaches that organisations use to improve their performance, including:

- identifying organisational strengths and weaknesses
- assessing and improving quality
- evaluating outputs, outcomes and impact
- strategic planning
- benchmarking processes and outcomes against other organisations.

The hub's work will fall into four main areas:

1. providing opportunities for voluntary organisations to learn and share their knowledge about effective performance improvement approaches
2. developing, training and supporting a network of local 'performance improvement advisors' offering support on performance improvement
3. producing clear and simple guidance about what works in performance improvement and developing new tools and techniques where needed, and
4. positively influencing the policies and practices of funders, regulators and policy-makers to create an environment conducive to performance improvement.

## Trustees

### Chair

Bill Feinstein

### Vice Chair and Treasurer

Jean Barclay

### Members

Rodney Buse

Jim Emerson

James Kelly

Janice Needham

Udeni Salmon (appointed  
21 April 2004)

Professor Helen Simons

Roger Sykes

Carl Upsall

Danielle Walker (resigned  
21 July 2004)

Karl Wilding (appointed  
21 April 2004)

## Staff

### Chief Executive

Colin Nee

### Assistant Director

Sam Matthews

### Administration Manager

Emma Corina

### Senior Consultant

(Evaluation & Quality)

Dr Rowan Astbury

### Senior Consultant (Evaluation)

Dr Jean Ellis

### Senior Evaluator/Trainer

Sally Cupitt

### Coordinator, National Outcomes Programme

Dr Richard Piper

### Programme Assistant, National Outcomes Programme

Peter Kelly (from 16 March 2004)

### Trainer/Evaluator

Shehnaaz Latif

### Trainer/Evaluator

Shahanara Begum (from  
1 June 2004)

### Trainer/Consultant (Quality Systems)

Eleanor Beardsley

### Training Coordinator

Talitha Bassett

### Training Administrative Assistant

Marcia Woods

### Administrative Assistant

Tamsin Young

### Executive Assistants

Mary Loxley and Ana Charry

### Freelance Accountant

John Googe

### Volunteer

Kim Perlow (from 2 November 2004)

## Associates

Our special thanks to the CES associates and independent consultants who worked with us during 2004:

Graham Baker, Sue Baker,  
Lucy Bishop Rowe, Mark Bitel,

Margaret Bolton, Sara Burns,  
Kath Gordon, Kate Graham,  
Rachel Houghton, Paul Huc,  
Joy MacKeith, Elizabeth Martindale,  
Aileen McKenzie, Shafiq Meghani,  
Eileen Murphy, Diana Parkinson,  
Keith Phillips, Frances Rubin,  
Shirley Scrivener, Peter Shore,  
Peter Williams

## Annual Review

### Articles

Dr Rowan Astbury, Talitha Bassett,  
Eleanor Beardsley, Emma Corina,  
Sally Cupitt, Dr Jean Ellis, Jane Kay,  
Shehnaaz Latif and Colin Nee

### Additional material

Dr Richard Piper and Julie Pottinger  
at NCVO

### Editing

Emma Corina and Colin Nee

### Proof reading

Ana Charry and Peter Kelly

### Special thank you to:

Kim Perlow for concept and planning

### Photography

Slater King

### Design

Dekko Advertising and Design

### Print

Datum Colour Print

## CES wishes to thank all the clients we worked with during 2004

Academy for Educational Development Croatia • Action for Prisoners' Families • African Swahiliphone Refugee Project • Anterior Management • Arthritis Care • Association of London Government • BBC Children in Need • Break • Breakthrough Breast Cancer • Brighton and Hove Working Together Project • British Association for Adoption & Fostering (BAAF) • Broadway • Chase CVS • Childline • Citizenship Foundation • Clinks • The Commonwealth Foundation • Community First Malvern • Community Foundations Network • Connexions • Contact a Family • CSC Regeneration & Research Consultants • Development Education Association • Doncaster Learning Partnership • Drugscope • Fair Share • Field Lane Foundation • Gloucester CVS • Gloucestershire Neighbourhood Project Network • Good Shepherd Trust • Haringey Association of Voluntary and Community Organisations (HAVCO) • Home-Start • Interights • The Ismaili Centre • Joseph Rowntree Foundation • Kidscape • Kingston Voluntary Action • Lambeth Voluntary Action Council • London Borough of Camden • London Borough of Tower Hamlets • London Housing Foundation • LSC North Yorkshire • Luton Churches Education Trust • London Voluntary Sector Council • Maldon CVS • Mercers' Charitable Foundation • The Mercers' Company • Middlesex University • Mind • The National Assembly for Wales • National Relate • Newham Black and Ethnic Minority Community Care Forum • Newham Training Network • Newcastle City Council • North West Essex CVS • Northamptonshire CVS • Norwich & Norfolk Voluntary Services • Plymouth Guild of Voluntary Service • The Small Woods Association • Sandwell Metropolitan Borough Council • Southern Housing Group • Southwark Council • Southwark Diocesan Welfare Trust • Sutton CVS • Thames Reach Bondway • Thrive • Tulip Mental Health Group • VOCAL • Watford CVS • Welsh Federation of Housing Associations • West Midlands Open College Network

# Summary of Financial information

## Trustees statement

The summarised financial information has been extracted from the full audited accounts prepared in accordance with the Companies Act 1985. The accounts, on which our auditors provided an unqualified opinion, were approved by the trustees on 20 April 2005, and have been filed with the Registrar of Companies and the Charity Commission. The full accounts are available on request from CES' office, and provide a more comprehensive description of the financial affairs of the charity.

Total income in 2004 amounted to £935,849, an increase of over 8% or £71,761 compared to 2003.

Total expenditure in 2004 was £902,037, an increase of just over 8% or £67,324 on the previous year. Direct charitable expenditure grew by 8% compared to 2003.

The costs of managing and administering the Company grew to £104,089, an increase of £9,246 compared to the previous year. The cost of generating funds also increased slightly, from £16,943 in 2003 to £19,126 in 2004.

Overall, the results show a modest surplus in 2004; incoming resources exceeded resources expended by £33,812. The surplus last year was £29,375.

**Jean Barclay**  
Honorary Treasurer  
20 April 2005

## Independent auditors' statement to the trustees of Charities Evaluation Services

We have examined the summary financial information set out on this page.

### Respective responsibilities of trustees and auditors

The Trustees are responsible for preparing the summary financial information.

Our responsibility is to report to you our opinion on the consistency of the summary financial information within the Annual Review with the full annual accounts and Trustees' Report and for no other purpose. We also read the other information contained in the Annual Review and consider the implications for our report if we become aware of any apparent misstatements or material inconsistencies with the summary financial information.

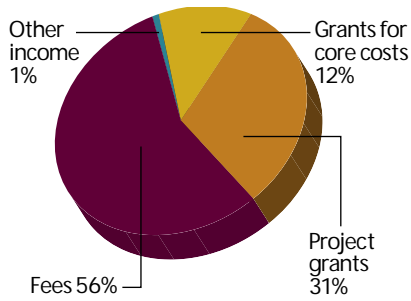
### Opinion

In our opinion the summary financial information is consistent with the full annual accounts and Trustees' Report of CES for the year ended 31 December 2004.

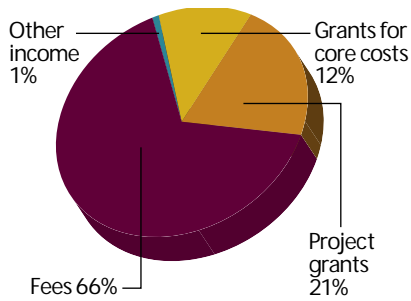
### Citroen Wells

Registered Auditors, Chartered Accountants  
21 April 2005

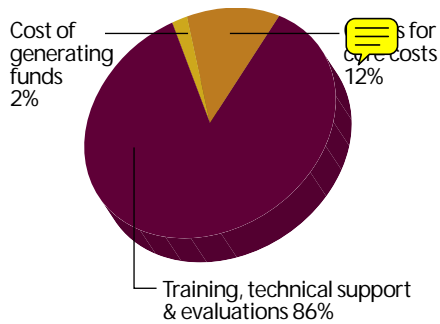
### Income breakdown 2004



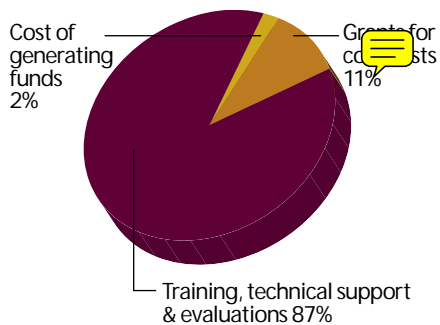
### Income breakdown 2003



### Expenditure breakdown 2004



### Expenditure breakdown 2003



### Income and Expenditure Account

	2004	2003
<b>Incoming resources</b>		
Grants for core costs	110,025	108,000
Grants for training, technical support and evaluations	292,269	185,299
Fees receivable for training, technical support and evaluations	528,215	567,338
Other income	5,340	3,451
<b>Total incoming resources</b>	<b>935,849</b>	<b>864,088</b>
<b>Resources expended</b>		
Cost of generating funds	19,126	16,943
Training, technical support and evaluations	778,822	722,927
Management and administration	104,089	94,843
<b>Total resources expended</b>	<b>902,037</b>	<b>834,713</b>
<b>Net income/(deficit) for the year</b>	<b>33,812</b>	<b>29,375</b>
Retained surplus brought forward	308,558	279,183
Retained surplus carried forward	342,370	308,558

### Balance sheet

<b>Fixed assets</b>	<b>454,565</b>	<b>467,253</b>
<b>Current Assets:</b>		
Stock	3,677	2,887
Debtors	133,114	161,825
Cash at bank and in hand	118,221	115,778
Creditors: falling due within one year	(83,166)	143,804
<b>Net Current Assets</b>	<b>171,846</b>	<b>136,686</b>
Creditors: falling due after more than one year	(284,041)	(295,381)
<b>Net Assets</b>	<b>342,370</b>	<b>308,558</b>
<b>Represented by:</b>		
Restricted funds	-	-
Unrestricted funds:		
- Fixed Asset Reserve	158,543	158,479
- General Reserve	183,827	150,079
	<b>342,370</b>	<b>308,558</b>

## Values

CES believes in:

- the power of self evaluation to make organisations stronger
- working in ways which respect diversity and are accessible to all
- working with the different interests of stakeholders
- using evaluation to help organisations learn, as well as be accountable
- sharing knowledge, and
- learning from those we work for.



### Charities Evaluation Services

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

Charity Registration number  
803602

Company registration number  
2510318

Registered in England & Wales  
A Company Limited by Guarantee

Registered office  
4 Coldbath Square  
London EC1R 5HL

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