

monitoring and evaluation resource guide

Charities Evaluation Services

Acknowledgements

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1. General guides and introductions to evaluation

Guides to monitoring and evaluation

Title	Monitoring and Evaluation in Context
Developed by	Plymouth Monitoring and Evaluation Development Group (PMEDG)
Year published	Aug 2005
Developed for	Groups and individuals who are relatively new to monitoring and evaluation activities.
Available from	http://www.plymouth-informed.org.uk/Docs/PMEDG/Monitoring%20and%20Evaluation%20context.pdf
Price	Free to download from 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	16pp
Description	<p>A short, easy to understand guide to understanding the links between monitoring and evaluation, why it is important, how to plan your monitoring and evaluation, ethics and data protection.</p> <p>It provides a useful glossary, references and further reading at the end.</p>

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, now the National Performance Programme at CES
Year published	2008
Developed for	Anyone wishing to develop an effective ICT system to improve their monitoring and evaluation
Available from	CES via Central Books http://www.ces-vol.org.uk/index.cfm?pg=126
Price	£12 plus 10% p&p
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	86pp
Description	<p>This is very useful workbook to developing an ICT system for monitoring and evaluation by using the 17 steps and covers 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 help and other help.</p>

Title	Monitoring and evaluation
Developed by	Voluntary Action Sheffield
Year published	No date found
Developed for	Voluntary and community organisations
Available from	http://www.vas.org.uk/dl/2798_6085564404.pdf/as/Monitoring%20and%20Evaluation08.pdf?prs=ece08838682f7499744b9e87bf513090
Price	Free to download from website. For more information contact: Voluntary Action Sheffield Tel: 0114 253 6600 Email: info@vas.org.uk Website: www.vas.org.uk
Approach	A brief introduction on what is monitoring and evaluation
Practical tools	
Use of case examples	One example
Lists additional resources	Useful publications
Size	10pp
Description	A VAS information sheet on: <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	Self-evaluation: a handy guide to sources (May 2003)
Developed by	Ambreen Shah, Evaluation and Research Analyst for BIG Lottery Fund
Year published	2005
Developed for	Voluntary and community organisations

Available from	http://www.biglotteryfund.org.uk/er_eval_self_evaluation_uk.pdf
Price	Free to download from BIG Lottery Fund website.
Approach	Monitoring and self-evaluation resources
Practical tools	No
Use of case examples	No
Lists additional resources	Useful websites
Size	16pp
Description	General self-evaluation resources as well as resources on education, health and environment. Includes useful websites.

Title	First steps in monitoring and evaluation
Developed by	Charities Evaluation Service
Year published	2002
Developed for	Charities and community organisations that are looking at monitoring and evaluation for the first time.
Available from	Charities Evaluation Service, www.ces-vol.org.uk Contacts: 020 7713 5692, enquiries@ces-vol.org.uk
Price	Hard copy £6.50 plus 10% p&p Also available to download for free from the publications section of www.ces-vol.org.uk
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	The case study of a family centre is used throughout the guide
Lists additional resources	Other CES publications are listed
Size	25pp
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
Developed by	Jean Ellis for Charities Evaluation Service
Year published	2005 (2 nd 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 Service, www.ces-vol.org.uk Contacts: 020 7713 5692, enquiries@ces-vol.org.uk
Price	£33.50 plus 10% pp
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	135pp
Description	<p>A practical and accessible guide covering the following topics:</p> <ul style="list-style-type: none"> • introduction to terminology • introduction to basic concepts, theory, evaluation approaches and research methodologies • tools for project management, from needs analysis and planning through to monitoring and review, but focusing on evaluation • practical advice on where to go for further guidance on the various steps, methods. <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. 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 020 7227 3500 http://www.phf.org.uk/
Price	£12.50 + £1.25 postage and packing
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	Does Your Money Make A Difference
Developed by	Libby Cooper and Heather Mayall for Charities Evaluation Services
Year published	2001
Developed for	Statutory and voluntary funders of any size
Available from	Charities Evaluation Services email: Enquiries@ces-vol.org.uk web: www.ces-vol.org.uk tel: 020 7713 5722
Price	£10.95 + p&p
Approach	Self-assessment tool
Practical tools	The tool provided provides models of good practice in monitoring and evaluation according to resource levels
Use of case examples	Short case examples are used to illustrate points
Lists additional resources	No
Size	26 pp
Description	This informal tool was developed from CES' work with funders and following a study carried out on behalf of the National Audit Office. It explores the reasons for evaluating grant giving and urges funders to evaluate in a way appropriate to their circumstances. Section 3 addresses good practice, suggesting key principles, illustrated by case examples. Section 4 comprises the self-assessment tool itself, permitting grantmakers to plot themselves at a level appropriate to their capacity and the standards they are seeking to meet.

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 www.fieldstonealliance.org/
Price	\$41.95
Approach	Focus on evaluative learning as a means of increasing nonprofit 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	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. It considers what is evaluated, who is involved and how funders can work together with external evaluators and grantees to develop learning. The book advocates a pragmatic approach to gathering information and its basic principles could be applied within a UK setting.

Title	Learning, Evaluation and Planning (LEAP): a handbook for partners in community learning
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 equally be of value to organisations or community projects wishing to establish a structured and focused approach to planning and evaluating their work.
Available from	Community Development Foundation Contacts: 020 7833 1772, admin@cdf.org.uk
Price	£17.95 plus 10% pp
Approach	Framework for planning evaluation
Practical tools	Yes
Use of case examples	The Leap resources section of the website (http://leap.scdc.org.uk/resources-downloads/leap-resources/) provides detailed case study provided of 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	76pp spiral bound
Description	<p>This handbook shows you how to build evaluation into your planning process from the outset, and provides practical help in all the stages involved, and includes developing outcomes and indicators.</p> <p>A number of accompanying publications are also available:</p> <ul style="list-style-type: none"> • LEAP Step-by-step (revised 2006) - A brief guide explaining what LEAP is, why it is needed, how it works, and how planning and evaluation fit together - £7 each or complementary when ordering the handbook • LEAP Support Manual (2006) Guidance notes and tools for trainers and support working – useful materials to help explore the components of the Learning Planning and Evaluation (LEAP) Framework – a copy can be downloaded from http://leap.scdc.org.uk <p>The CDF office in Scotland, Scottish Community Development Centre, have also developed:</p> <ul style="list-style-type: none"> • LEAP for Health, a resource designed to assist projects and programmes enabling people to develop and maintain their health on a day-to-day basis through individual and community action – a copy can be downloaded from Health Scotland website www.healthscotland.com • Greenspace LEAP, outlining the LEAP approach and its application for Greenspace work, including guidance on planning outcomes and developing outcome indicators – copy can be purchased from Greenspace Scotland (£35 plus £3.20 pp for organisations within Scotland; £75 plus £3.20pp for organisations outside Scotland) www.greenspacescotland.org.uk

Title	The Evidence Guide
Developed by	Barnardo's
Year published	2006
Developed for	Social care professionals
Available from	Barnardo's, Tanners Lane, Barkingside, Ilford, Essex IG6 1QG. Tel: 020 8550 8822
Price	Each module includes a learner's pack and a trainer's pack. Learner's packs are £12 each per module and trainer's packs are £22 each per module. The whole set is £140.
Approach	Outcomes and general evaluation; eEvidence based research
Practical tools	Sample session plans, activities and handouts
Use of case examples	No
Lists additional resources	Some references provided
Size	
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. The learner's packs use individual activities, review questions and key message boxes to facilitate interactive, self-guided learning. The trainer's packs contain session plans, learning outcomes and group activities as well as a CD of handouts and slides in order to run 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	The prove and improve website www.proveandimprove.org/new/practicalguides.php
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 bibliography provided.
Size	40 pp
Description	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. It provides practical guidance to encourage thinking about 'what works and what doesn't', and to explore the questions 'where am I now?' and '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 (JRF) Contacts: 01904 615905, info@jrf.org.uk Can be downloaded from the bookshop section of the JRF website www.jrf.org.uk
Price	Free to download from the JRF 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 JRF Neighbourhood Programme organisations might consider
Lists additional resources	No
Size	12pp
Description	This booklet provides a short introduction to evaluation and presents five steps to follow when evaluating a community project

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	http://shop.niace.org.uk/media/catalog/product/R/e/Readability.pdf
Price	Free to download from website
Approach	None
Practical tools	No
Use of case examples	No
Lists additional resources	No
Size	12pp
Description	<p>Although not strictly about monitoring and evaluation, this leaflet may be helpful when writing an evaluation report.</p> <p>This leaflet outlines the principles that will help you to present written texts clearly, taking account of the needs of your readers.</p>

Title	Good practice guide: user involvement
Developed by	Big Lottery Fund
Year published	August 2008
Developed for	Voluntary and community projects
Available from	http://www.biglotteryfund.org.uk/er_res_good_practice_guide_user_involvement.pdf
Price	Free to download from 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	4pp for user involvement guide
Description	The good practice guides are based on evaluation findings from the 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, www.ces-vol.org.uk Contacts: 020 7713 5692, enquiries@ces-vol.org.uk
Price	Full set of nine £32.50 or £4.00 each, plus 10% p&p
Approach	Useful for self-evaluation and external evaluation
Practical tools	Give practical examples, real life case studies, checklists and ideas.
Use of case examples	Case examples are used in each papers to illustrate the topic and use of approaches.
Lists additional resources	Each paper has useful references
Size	8-12pp
Description	A series of papers introducing and discussing the following evaluation topics: <ul style="list-style-type: none"> • Paper 1 – The purpose of evaluation • Paper 2 – Different ways of seeing evaluation • Paper 3 – Self-evaluation • Paper 4 – Involving service users in evaluation • Paper 5 – Performance indicators: use and misuse • Paper 6 – Using evaluation to explore policy • Paper 7 – Outcome monitoring • Paper 8 – Benchmarking in the voluntary sector • Paper 9 – Assessing Impact

Title	Guidance papers
Developed by	Charities Evaluation Services
Year published	2004 and 2005
Developed for	Voluntary and community organisations
Available from	Charities Evaluation Service www.ces-vol.org.uk Contacts: 020 7713 5692, enquiries@ces-vol.org.uk
Price	Free to download from CES website, www.ces-vol.org.uk
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 pp
Description	<ul style="list-style-type: none"> • Guidance paper 1: How much should we expect to pay for an external evaluation? 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. • Guidance Paper 2: What to include in an evaluation brief. 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. • Guidance paper 3: Key terms and definitions. 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.

2. Assessing outcomes and impact

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	August 2007
Developed for	Those interested in setting and reporting outcomes in a funding context.
Available from	http://www.evaluationsupportscotland.org.uk/downloads/VAFinvestingnoutcomes.pdf
Price	Free download from website
Approach	Outcomes monitoring
Practical tools	No
Use of case examples	No
Lists additional resources	No
Size	13pp
Description	<p>This report is based on the Outcomes Monitoring Pilot project which provided bespoke training and support to funded projects.</p> <p>It explores the barriers to recording and reporting outcomes in voluntary organisations. 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>

*Sourced with permission from the Evaluation Support Scotland website.
www.evaluationsupportscotland.org.uuk

Title	Explaining the difference your project makes: A BIG guide to using an outcomes approach
Developed by	Sara Burns and Joy MacKeith, Triangle Consulting for the Big Lottery
Year published	2006
Developed for	Applicants to Big Lottery Fund
Available from	Big Lottery Fund www.biglotteryfund.org.uk

Price	Download for free from Big Lottery fund website
Approach	Outcomes
Practical tools	The guide includes a number of exercises to help identify outcomes and measure your achievement
Use of case examples	Project examples are used throughout.
Lists additional resources	The website also provides some examples of CES planning triangles, and factsheets and resources.
Size	37pp
Description	This guide sets out some of the main steps to identify need, plan and assess the benefits of a project using an outcomes approach. Although specifically addressed to applicants to Big Lottery Fund, the guide provides a useful introduction to the outcomes approach, particularly for those who are new to this approach to evaluation.

Title	Your project and its outcomes
Developed by	Sally Cupitt with Jean Ellis for Charities Evaluation Service
Year published	2007
Developed for	All voluntary and community organisations, particularly those new to outcomes.
Available from	Charities Evaluation Service.
Price	£7.95 plus p&p. Hard copies can also be obtained free of charge for small organisations of five staff or less. Contact enquiries@ces-vol.org.uk Download free from the publications section of the website www.ces-vol.org.uk
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	23pp
Description	This guide is divided into three chapters: understanding outcomes; identifying and assessing outcomes; and using outcomes information.

Title	A DIY Guide to implementing outcome monitoring
Developed by	Sara Burns for Alcohol Concern
Year published	2000
Developed for	Agencies working in the field but useful as a general introduction to monitoring outcomes
Available from	Alcohol Concern Contacts: 020 7395 4000, contact@alcoholconcern.org.uk
Price	£12.10 incl. p&p
Approach	Outcomes monitoring
Practical tools	A template for an outcome monitoring questionnaire is included at the end of the guide
Use of case examples	Case studies used within the text
Lists additional resources	No
Size	70pp
Description	A step by step guide to monitoring outcomes which includes deciding which outcomes to monitor, consultation and testing, analysing and presenting data.

Title	Outcomes into Practice
Developed by	Elinor Nicholas, Hazel Qureshi and Claire Bamford for SPRU, University of York
Year published	2003
Developed for	Managers and trainers in social care
Available from	Social Policy Research Unit, University of York Tel: 01904 433608 email:spruinfo@york.ac.uk
Price	
Approach	Understanding, assessing and using outcome information
Practical tools	This is a resource pack containing presentation material, worksheets and sample practice tools
Use of case examples	Limited use of case scenarios within the training materials
Lists additional resources	Some additional references provided
Size	Part 1, 152 pages; Part 2, 248 pages.
Description	<p>This is a comprehensive, researched resource pack on outcomes in the social care field, drawing on a programme of work with social service departments in Bradford and the City of York and with participation of a number of other agencies.</p> <p>Part 1 introduces an outcomes approach and an overview of outcome-focused care management. It introduces good practice in collecting, interpreting and using outcomes information, and looks at the different stakeholder perspectives. Some practical examples are provided, such as a sample plan and questionnaire. Practical suggestions are made for using outcomes information within a context of change management.</p> <p>Part 2 comprises a comprehensive set of materials for training and development, also available on a CD. These materials can be used and reproduced for training purposes subject to copyright restrictions. The resources include sample programme, presentation materials, facilitator's notes, exercises and worksheets, handouts and examples of practice tools.</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 Nonprofit Organisations
Year published	2004
Developed for	Both large and small nonprofit organisations
Available from	The Urban Institute, Washington DC. Email: paffairs@ui.urban.org
Price	Downloadable for free from: www.urban.org/url.cfm?ID=310973
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 pp
Description	<p>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.</p> <p>The text is accompanied by sample tables demonstrating how data can be analysed and reported.</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	http://www.biglotteryfund.org.uk/wellbeing_evaluation_tools.pdf
Price	Free to download from the website
Approach	
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	47pp
Description	<p>Introduction to BIG well-being evaluation tools.</p> <p>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.</p>

Title	Quality of life: using quality of life indicators
Developed by	Audit Commission
Year published	2002
Developed for	Local authorities and their partners to help monitor their community strategy.
Available from	Audit Commission, 1st Floor, Millbank Tower, Millbank, London SW1P 4HQ. Tel: 020 7828 1212
Price	Free to download from their website www.audit-commission.gov.uk/reports/PERFORMANCE-INFORMATION-DOCUMENT.asp?CategoryID=andProdID=9EE6B420-D224-11d6-B1BB-0060085F8572

Approach	Quality of life indicators
Practical tools	A pull out chart of quality of life indicators
Use of case examples	No
Lists additional resources	A list of useful websites can be found on the back of the pull out chart
Size	14pp
Description	A short booklet describing what quality of life indicators are and why they are important. It also sets out and discusses the set of quality of life indicators developed with more than 90 local authorities during a pilot phase in 2001/02.

Title	SpiritLevel
Developed by	Fairbridge
Year published	N/A
Developed for	Third sector organisations wishing to measure quality of life outcomes
Available from	Fairbridge, 207 Waterloo Road, London SE1 8XD. Tel: 020 7902 1635, info@spiritlevel.org.uk http://www.spiritlevel.org.uk/
Price	SpiritLevel CD £15. However, you need to go on the training course, which costs £99 per person. Licences from £6-£10 per user
Approach	Quality of life profiles
Practical tools	See description below
Use of case examples	N/A
Lists additional resources	No
Size	N/A
Description	<p>The SpiritLevel programme is a CD-ROM based system that can create and store quality of life profiles for individual participants over a period of time. It takes periodic snapshots of how an individual assesses their own quality of life across a wide range of areas - such as health, friendship, values and control over one's life. It pinpoints areas where work is needed, as well as demonstrating progress over time.</p> <p>The profile consists of 72 questions arranged as 2 sequences of 27 questions, then 2 sequences of 9 questions. Once the participant has completed the very last questions, his/her profile records are updated. The profile records include the participant's name and the time and date profile created. Stored profiles can be viewed or printed as hard copy from the computer's hard disc which stores them securely in encrypted form.</p>

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 and Groundwork www.neweconomics.org
Price	Downloadable for free from 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	130pp
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 has been 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, City College Norwich, Ipswich Road, Norwich NR2 2LJ. Tel: 01603 773364 www.theresearchcentre.co.uk/soul/index.htm
Price	<p>Price: Training on how to use the SOUL Record is available at the cost of £150 per person. Included in the price are:</p> <ul style="list-style-type: none"> • One days training from a recognised SOUL Trainer • Training materials • A copy of The SOUL Record folder • User Guide • CD containing electronic copies of The SOUL Record and User Guide plus the Spreadsheet Results Package (SRP) • Certificate of Attendance to a SOUL User Training course • Room Hire / Location • Travel to a suitable location by the SOUL Trainer • Refreshments / Buffet Lunch • Ongoing telephone and e-mail support
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	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. A group of voluntary organisations in Norfolk therefore 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.

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	Institute for Employment Studies, Mantell Building, University of Sussex Campus, Brighton BN1 9RF.
Price	free to download from the ESF website http://www.esf.gov.uk/_docs/distance%5B1%5D.pdf
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	23pp
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	www.wefo.wales.gov.uk
Price	Downloadable for free
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	86pp
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. 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.</p> <p>The guide also includes an annex providing information and sample documentation from ten different organisations. The different approaches used by these organisations to measure soft outcomes and distance travelled could be adapted for use by other organisations. 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 Progress: A model for measuring individual progression – a guide and toolkit for practitioners
Developed by	Bridges Project
Year published	2001
Developed for	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. 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.
Available from	Bridges Project www.bridgesproject.org.uk
Price	Both the guide and the toolkit can be downloaded from the Bridges Project website
Approach	Measuring soft outcomes
Practical tools	Practical tools are provided throughout, eg, 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	The guide is 31pp. The toolkit is available in 3 sections: Section 1- 8pp; Section 2 - 41pp; Section 3 – 62p
Description	Bridges to Progress is an evidence-based model for measuring individual progress towards self-reliance and employability, particularly for the most vulnerable people within society. It focuses on the measurement of 'soft' outcomes – based mainly on qualitative methods of assessment. Some 'hard' or quantitative measurement is included. The Guide for Practitioners describes Bridges to Progress and the standards and principles that underpin the programme. The accompanying Toolkit provides concrete examples of how the piloting projects used the system as well as case studies.

More tools on outcomes can be found within the sub-sector specific guidance (Section 4 of this resources guide).

Understanding and assessing impact

NB There may not be a clear distinction in the level of assessment between those resources listed under ‘outcomes’ and those under ‘impact’. We have grouped these resources on the basis of the use of terminology only.

Title	The Impact of Impact Assessment: the experience of rural voluntary organisations in evaluating change.
Developed by	Holly Yates, Veronique Jochum and Deborah Turton for National Council for Voluntary Organisations
Year published	2004
Developed for	Voluntary organisations in rural areas
Available from	NCVO: Tel: 02 7713 6161
Price	Downloadable for free from the NCVO website www.ncvo-vol.org.uk/publications/
Approach	Impact assessment
Practical tools	No
Use of case examples	Three organisations provide the basis for case studies, located in the East Midlands, Yorkshire and the Humberside and the South West. These are of different sizes, one service delivery organisation, one community arts organisation and an environmental conservation agency.
Lists additional resources	Yes
Size	44 pp
Description	<p>This publication reports on an NCVO research study. It places the study within the policy context, discussing why impact matters, and its relevance to performance improvement, added value and accountability. Research findings are introduced in Chapter 3 by some definitions and brief review of approaches to impact assessment.</p> <p>Chapter 4 presents the research, which comprised two elements: in-depth interviews; and two focus groups held with representatives of voluntary and community organisations. The findings look at approaches to monitoring and evaluation used, attitudes towards impact assessment and funder reporting requirements within a grant-aid and contracting context. The conclusions and recommendations looks at issues such as regulation, proportionality, getting buy in and strategic planning.</p>

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 www.proveandimprove.org
Price	Can be downloaded for free from library section of prove and improve website
Approach	Impact assessment
Practical tools	No
Use of case examples	No
Lists additional resources	No
Size	36pp
Description	<p>This report examines the underlying principles and basic methods of assessing impact on development projects. 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. 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.</p> <p>It is written in a way that assumes previous experience in monitoring and evaluation.</p>

Title	First steps in impact assessment
Developed by	Lloyds TSB Foundation for England and Wales
Year published	2001
Developed for	Trusts and foundation seeking to evaluate the impact of their funding programmes
Available from	Lloyds TSB Foundation for England and Wales, 3rd Floor 4 St. Dunstan's Hill, London EC3R 8UL. Tel: 0870 411 1223
Price	Price not found
Approach	Programme evaluation, impact assessment
Practical tools	Sample questionnaires and comparative table of different methods of assessment
Use of case examples	Yes
Lists additional resources	No
Size	71pp
Description	A report on a pilot exercise carried out by Lloyds TSB Foundation with the organisations it funded and its own staff as evaluators. It covers the process and results of the exercise and explores the issues raised.

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 groups as a participative tool to plan, monitor, review and evaluate projects and programmes
Available from	DTA. www.dta.org.uk
Price	Hard copy £5. The guide can also be downloaded for free from the publications section of the DTA website
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 - Hailsham Trust Community Safety Centre, Account 3 women's co-operative, Market Rasen Development Trust.
Lists additional resources	
Size	16pp
Description	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. 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. 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.

More tools on impact can be found within the sub-sector specific guidance (Section 4 of this resources guide).

3. Evaluation approaches and methods

Overview of evaluation methods

Title	A participatory model for evaluating social programs
Developed by	Written by Yehekel '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	http://www.irvine.org/assets/pdf/pubs/evaluation/Eval_Social.pdf
Price	Free to download from 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	27pp
Description	This American publication is a part case study and part instruction guide, describing the '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	March 2003
Developed for	DFID officers and others involved in development activity
Available from	http://www.dfid.gov.uk/Documents/publications/toolsfordevelopment.pdf
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	142pp
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.

Title	An overview of evaluation methods
Developed by	Evaluation Trust
Year published	N/A
Developed for	Voluntary and community sector organisations
Available from	Evaluation Trust 12 Bulmershe Road, Reading RG1 5RJ Tel: 0118 966 4864. email: sarahdeltufo@evaluationtrust.org www.evaluationtrust.org
Price	Downloadable for free from http://www.evaluationtrust.org/tools/
Approach	Self-evaluation, peer evaluation, using external consultants
Practical tools	A few practical exercises for collecting qualitative data and a table to help you choose the best method of evaluation for your user group.
Use of case examples	No
Lists additional resources	A bibliography is attached.
Size	N/A
Description	The Toolkit provides advice and guidance on different methods of evaluation and how best to use them. It also contains tips and guidance on different data collection methods including observation, interviews, case studies and group work.

More information providing an overview of evaluation methods can be found in the general guides and introductions to monitoring and evaluation (Section 1 of this guide to resources).

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, One Michigan Avenue East, Battle Creek, Michigan 49017-4012 U.S.A. www.wkkf.org
Price	Free to download from their 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	72pp
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, how a 'Theory of Change Logic Model' can be developed for projects and for use in evaluation.</p>

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, 1515 E. Osborn Road, Phoenix, AZ 85014 www.vsuw.org
Price	Free to download
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	A few are mentioned on p16
Size	43pp
Description	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 to completing a logic model, with a blank format provided. The handbook also provides guidance on how to complete sections on: goal; 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	Available from: www.theoryofchange.org
Price	Free to download from the website www.theoryofchange.org
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	'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. The example demonstrates how the project moved through the five steps of: 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 nonprofit organisations, but can be used as a stand alone guide.
Available from	Available from: www.innonet.org
Price	Free to download from the website www.innonet.org
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 available on the Innovation Network website.
Size	30 pages
Description	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. The two appendices provide a logic model template and a worksheet demonstrating the chain between shorter-term outcomes, intermediate outcomes and longer-term outcomes.

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	UK Poverty Programme, Oxfam in Scotland, 1st Floor, 2007, Bath Street, Glasgow G2 4HZ. Tel: 0141 285 8880, ukpp@oxfam.org.uk www.oxfamgb.org/ukpp
Price	Free to download from their 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	24pp
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	http://www.aidsalliance.org/sw36326.asp
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 pp
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, but other sections also provide tools that can be used for information collection during a (Sections D); Experiential tools (Section E); Prioritisation and quantification tools (Section F) and Action planning tools (Section G).</p> <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	Not found (2000)
Developed for	International development agencies
Available from	www.idrc.ca/evaluation
Price	Free to download from the website
Approach	Outcome mapping
Practical tools	None
Use of case examples	None
Lists additional resources	No
Size	4pp
Description	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. Although related to international development interventions, this approach can be applied to domestic projects and programme.

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	www.idrc.ca/evaluation
Price	Free to download from the website
Approach	Outcome mapping
Practical tools	None
Use of case examples	None
Lists additional resources	No
Size	29 pp
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. 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.</p> <p>This paper provides a useful thinking tool when planning, designing and focusing evaluation.</p>

Social accounting and audit

Title	Social accounting and audit - the manual
Developed by	John Pearce, Alan Kay (Social Audit Network)
Year published	2005
Developed for	All types of voluntary organisations, although particularly taken up by social enterprises.
Available from	Social Audit Network, c/o CBS Network, 45-47 Albany Street, Edinburgh EH1 3QY. Tel: 01392 666281. email: info@socialauditnetwork.org.uk www.socialauditnetwork.org.uk ,
Price	£40 inc. pp
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	80pp, also available on CD
Description	<p>The manual is for any organisation that has social, environmental or economic impacts: organisations such as social enterprises, community enterprises, businesses, schools, health clinics or any organisation that wishes to measure its overall performance, its impact and added value can use it.</p> <p>The publication describes a framework for social accounting and audit and what needs to be in place to make it happen, such as commitment and funding. The manual works through each of the steps, providing key terms, resources, exercises and worked examples throughout.</p> <p>The manual is also provided on CD, with links to associated materials such as case studies, templates, sample questionnaires and other techniques as well as presentational material and web links.</p>

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	Social Economy Scotland Janette Campbell on 0131 479 5162 or email: janette.campbell@communitiesscotland.gsi.gov.uk
Price	Free to download from website www.socialeconomyscotland.info
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	64pp
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	Voluntary and Community Unit, 3rd Floor, Lighthouse Building, 1 Cromac Place, Gasworks Business Park, Ormeau Road, Belfast, BT7 2JB. Tel: 028 9082 9425 email: vcs@dndni.gov.uk www.dndni.gov.uk/
Price	Free to download from the 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	24pp
Description	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. CVS's or other voluntary organisations may find it useful in setting the context for the funded activity or to relate evaluation data to the framework.

* These two entries have been sourced with permission from the Evaluation Support Scotland website: www.evaluationsupportscotland.org.uk

Social return on investment

Title	A guide to Social Return on Investment
Developed by	SROI Network. Written by Jeremy Nicholls, Eilis Lawlor, Eva Neitzert and Tim Goodspeed, and edited by Sally Cupitt,
Year published	2009
Developed for	Anyone interested in SROI for the third sector
Available from	www.sroi-uk.org/
Price	Free to download
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 79 pages; another 26 of additional resources
Description	The workbook takes you through the six steps in an SROI: <ol style="list-style-type: none"> 1. Establishing scope and identifying key stakeholders 2. Mapping outcomes 3. Evidencing outcomes and giving them a value 4. Establishing impact 5. Calculating the SROI 6. Reporting, using and embedding.

Title	Measuring Real Value: a DIY Guide to Social Return on Investment
Developed by	Ellis Hawlor, 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	www.neweconomics.org/
Price	The guide can also be downloaded for free from the publications section of the nef website
Approach	Translation of social impact into financial measures
Practical tools	The guide 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 pp
Description	<p>This DIY guide is organised around the four stages of the nef SROI approach. Stage 1: Boundary setting and impact mapping. Stage 2: Data collection. Stage 3: Modelling and calculating the SROI. Stage 4: Report and embed. Appendices contain 1) nef's seven principles of good measurement 2) storyboard exercise 3) impact map template.</p> <p>This second edition aims to make economic analysis accessible to a range of audiences, including those with limited resources. There are now fewer stages than previously, 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>

4. Sub-sector specific guidance

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	http://www.aqvx59.dsl.pipex.com/Lost in translation.pdf
Price	Free download available from website
Approach	Outcomes approach
Practical tools	Practical methods included
Use of case examples	Yes
Lists additional resources	List of references used
Size	35pp
Description	<p>Lost in Translation – a toolkit for understanding, defining, measuring and communicating outcomes.</p> <p>It provides practical methods for developing an outcomes-focused approach to monitoring the quality of advocacy provision. Includes 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	http://www.organizationalresearch.com/publications/a_guide_to_measuring_advocacy_and_policy.pdf
Price	Free to download from above 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. Available from www.organizationalresearch.com .
Size	46 pp
Description	<p>This American guide helps determine meaningful ways to measure and evaluate the impact of advocacy and public policy grantmaking.</p> <p>It provides an outcomes framework with outcome categories for advocacy and policy work. The directions for evaluation design includes a broad range of methodologies, intensities, audiences, timeframes and purposes.</p> <p>The guide is presented in two main sections: Section 1 is an overview of the context for measurement of advocacy and policy work, including the inherent evaluation challenges. 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	A Handbook of Data Collection Tools: companion to a guide to measuring advocacy and policy
Developed by	Researched and written by Jane Reisman, PH.D; Anne Gienapp, M.P.A; Sarah Stachowiak, M.P.A

Year published	2007
Developed for	Primarily grantmakers and advocacy organisations but useful for evaluators involved with measurement of advocacy and policy work
Available from	http://www.organizationalresearch.com/publications/a_handbook_of_data_collection_tools.pdf Organizational Research Services: www.organizationalresearch.com and www.aecf.org . It is also available as an online resource at www.innonet.org .
Price	Free to download from 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 pp
Description	<p>This American handbook of data collection tools is intended to serve as a companion to A Guide to Measuring Advocacy and Policy. The handbook provides examples of practical tools and processes for collecting useful information from policy and advocacy efforts for both grantees and funders.</p> <p>Sample tools to measure the core outcome areas related to social change or policy change is also available.</p> <p>Each section contains instructive and practical information for those involved in many different aspects of advocacy and policy change work.</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 publications section of the Arts Council website www.artscouncil.org.uk/
Price	Free download available from the 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 pp
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. It is organised within a framework of five stages of evaluation: planning; collecting evidence; assembling and interpreting; reflecting and moving forward; reporting and sharing.</p> <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 website www.proveandimprove.org
Price	Download for free from the library section of 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	97pp
Description	This evaluation toolkit is aimed at helping arts organisations increase their own capacity for evaluation and integrate evaluation into day-to-day operations. It provides an introduction to evaluation and the evaluation process with links to the tools in the toolkit.

Title	Monitoring and evaluating your arts event...Why bother
Developed by	David Chamberlain, Meic Llewellyn and Mike Hoston for Voluntary Arts Wales
Year published	Not found
Developed for	Arts organisations running events
Available from	Voluntary Arts Wales Tel: 01938 556 455 or email: sioned@vaw.org.uk
Price	Available to download from www.voluntaryarts.org
Approach	Self-evaluation
Practical tools	Questionnaires and a sample 'archery target' in the appendices
Use of case examples	Appendix one contains a detailed case study of a theatre company.
Lists additional resources	No, although these can be found elsewhere on the website www.voluntaryarts.org
Size	26 pp
Description	This guide is aimed at those arts organisations beginning to monitor and evaluate their work. Part 1 contains an introduction to the process and tools that might be used. Part 2 contains some example tools, including some ideas for monitoring and an introduction to feedback questionnaires.

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. Tel: 02920 395 395 info@voluntaryarts.org
Price	Available to download from www.voluntaryarts.org
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	38pp
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. The guide also suggests different ways of measuring attendance, responses and views.</p> <p>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	Youth Arts in Practice: a guide to evaluation
Developed by	Linda Dixon and Nicola Aylward for 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) website www.niace.org.uk/research/YALP/ContactUs.htm Tel: 0116 285 9672
Price	Hard copy only available free from 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 book, contains detailed case studies from five projects, including illustration of the tools used and the findings.
Lists additional resources	No
Size	104 pp
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.</p> <p>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. 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>

Children and young people

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	http://www.invo.org.uk/pdfs/Involving Young People in Research 151104 FINAL.pdf
Price	Free to download from 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	34pp
Description	<p>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.</p> <p>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 and ensuring their health, safety and well-being.</p>

Title	A Guide to Self Evaluation: How to Tell You are Making a Difference: a Basic Guide for Voluntary Organisations
Developed by	Julia Kaufmann and Sheila Jane Malley, BBC Children in Need
Year published	First published in 1999; updated January 2009
Developed for	Voluntary and community projects that Children in Need fund but also useful for other voluntary groups and organisations
Available from	http://www.bbc.co.uk/pudsey/grants/evaluation.pdf
Price	Free to download from BBC CiN website
Approach	Step by step approach to planning and doing self-evaluation
Practical tools	CES Planning Triangle
Use of case examples	Yes
Lists additional resources	Reading list and useful addresses provided at the end
Size	25pp
Description	<p>This booklet gives an introduction to each step in the monitoring and evaluation process. It covers aims and objectives, activities, targets and indicators of success on how to reach evaluation. It provides a case study for each step and links planning to monitoring and evaluation.</p> <p>Originally written for BBC CiN funded projects in 1999, it has since been updated as an online resource in January 2009 and is available to anyone who is interested in the basics.</p>

Title	Set of 80 Consultation Cards with Illustrations
Developed by	Department of Health
Year published	2005
Developed for	Anyone working with people with learning disabilities
Available from	http://www.aqv59.dsl.pipex.com/DoH%20LD%20report%20showcards.pdf
Price	Free to download from website
Approach	
Practical tools	Consultations pictures
Use of case examples	No
Lists additional resources	No
Size	84pp
Description	A useful set of cards, with pictures, that may be useful for communicating in a more accessible way with people with Learning Disabilities 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	Hard copies available from Helen Andrews, Children's Fund Office, ELH1402, Shire Hall, Cambridge CB3 0AP Tel: 0777 400 8126 Free to download from http://www.cambridgeshire.gov.uk/NR/rdonlyres/91176010-5FF3-4708-8449-1BA2D1CABD9F/0/AreyouListening.pdf
Price	Downloadable for free from the 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	80pp
Description	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: 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 - Charting Young People's Progress*
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, Rosebery House, 9 Haymarket Terrace, Edinburgh EH12 5EZ. Tel: 0131 313 2488. email: info@youthlink.co.uk
Price	Free to download from their website www.youthlink.co.uk/practicedevelopment/stepitup
Approach	Self-evaluation
Practical tools	Worksheets and guidance on how to use them.
Use of case examples	Case study examples used to illustrate explanations.
Lists additional resources	Yes
Size	102pp
Description	<p>This document is both a report of work commissioned by the Scottish Executive Education Department in 2001 and materials developed for evaluating youth work.</p> <p>The report identifies the purpose of effective youth work and key areas of social and emotional competence. The second part of the document provides materials and guidance for working with young people charting their own progress and identifies a range of approaches to support the process.</p>

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	The Stationery Office at www.tsoshop.co.uk/bookstore.asp or on 0870 242 2345
Price	The framework is free to download at www.dh.gov.uk/prod_consum_dh/groups/dh_digitalassets/@dh/@en/documents or you can download the whole pack at www.dh.gov.uk/en/Publicationsandstatistics/Publications/ These can also be purchased from The Stationery Office (£9.50/ £17.50).
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 109pp and the pack of questionnaires and scales is 50pp
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. 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 child care 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, Ashford, Kent. Tel: 01233 666610 www.kentchildrensfund.net
Price	Free to download from the Kent Children's Fund website
Approach	Measuring 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	109pp
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> <ul style="list-style-type: none"> • Section 1 provides a guide to using the toolkit • Section 2 discusses what impact means and helps break it down into component parts • Section 3 lists principles for impact measurement • Section 4 is a guide to setting realistic and measurable indicators • Section 5 provides a set of specific tools for use with children • Section 6 advises on putting together report to show impact • Section 7 list further information and links.

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 Keppel Street, London WC1E 7HT. Tel: 020 7636 8636
Price	Price not found
Approach	General introduction to evaluation
Practical tools	Topic guidance sheets: 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	5pp 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 (HLF)
Year published	Publication date not found
Developed for	Voluntary and community organisations funded by the HLF 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 Contacts: 020 7591 6000
Price	Can be downloaded for free from the HLF website www.hlf.org.uk
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.

* These two entries have been sourced with permission from the Evaluation Support Scotland website: www.evaluationsupportscotland.org.uk

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	October 2008
Developed for	Voluntary and community organisations that want to explore evaluation, in particular self-evaluation of outcomes
Available from	CENI website: www.ceni.org Tel: 028 9024 8005, email: info@ceni.org
Price	Downloadable for free from the 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	40pp
Description	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: planning, collecting evidence, analysis, reporting and using evaluation

Title	The evaluation journey - an evaluation resource for community groups
Developed by	Linda McKie, Joy Barlow and Paula Gaunt-Richardson for Action on Smoking and Health Scotland (ASH)
Year published	2002
Developed for	Based on the experience of community groups but applicable to any organisation doing monitoring and evaluation within a health setting and provides useful information more generally.
Available from	ASH Scotland, 8 Frederick Street, Edinburgh EH2 2HB ashscotland@ashscotland.org.uk , 0131 225 4725
Price	Free in hard copy and to download from their website www.ashscotland.org.uk
Approach	Self-evaluation
Practical tools	Some templates included
Use of case examples	Illustrative examples are used throughout.
Lists additional	List of useful groups and publications included.

resources	
Size	104pp
Description	<p>This resource pack includes guidance on a range of issues including:</p> <ul style="list-style-type: none"> • Planning the evaluation and who will take part; • Basic information and how to collect it; • Analysing/making sense of your information; • Reviewing your work and presenting your findings. <p>The pack covers a range of ways of collecting information including photos; video; collages; artwork; creative writing; diaries; interviews; focus groups; case studies and questionnaires. It reviews the purpose of each, their positive points and possible problems. The pack also includes examples of how they have been used. It also includes a glossary of terms and evaluation questions.</p>

Title	Changing Places, Changing Lives: understanding and developing the impact of your organisation
Developed by	bassac
Year published	2006
Developed for	'Community anchor' organisations, local organisations rooted in the communities where they work
Available from	bassac 0845 241 0375, mary@bassac.org.uk or download from bassac website www.bassac.org.uk
Price	Downloadable for free from the website
Approach	Understanding and mapping impact
Practical tools	Provides 'ideas for action' – suggested activities to help assess your impact on individuals, organisations and communities.
Use of case examples	
Lists additional resources	Useful resources are listed under the headings: <ul style="list-style-type: none"> • Getting started • Assessing outcomes and impacts • Getting the quality right • Evaluating social enterprise.
Size	17pp
Description	This guide introduces bassac's Community Impact Programme. It aims to help organisations understand the importance of being able to demonstrate their impact and outlines some of the steps organisations can take to 'map' the impact they are having.

Title	ChangeCheck: a practical guide to assessing the impact of your community organisation
Developed by	Chris Church and Steve Skinner for bassac
Year published	2007
Developed for	'Community anchor' organisations, local organisations rooted in the communities where they work
Available from	bassac, 33 Corsham Street, London N1 6DR. Tel: 0845 241 0375 email: info@bassac.org.uk
Price	£12.50 + postage and packing & VAT: 1-4 copies £2.50, 5-10 copies £5.00, 10-20 copies £7.50
Approach	Impact assessment
Practical tools	Lots of checklists and action points throughout the guide. Once a copy is purchased, further materials and resources are available on the bassac website
Use of case examples	No
Lists additional resources	No
Size	32pp
Description	<p>ChangeCheck was developed within bassac's Community Impact Programme, which has worked to develop tools to help community anchor organisations assess the effect of their work on their neighbourhood and was tested with several community organisations across England.</p> <p>It uses the wellbeing categories developed by the Audit Commission. It is designed to bring together:</p> <ul style="list-style-type: none"> • Your mission and objectives • The way you work with communities • How what you do affects community wellbeing • The resources that you have to do this with.

Title	Community economic regeneration: A framework for evaluating community projects for European funding
Developed by	Marilyn Taylor for Wales Council for Voluntary Action
Year published	2003
Developed for	Community and voluntary groups in Wales who have European funding under Objective 2 but can be used by any project involved in developing community based regeneration initiatives.
Available from	WCVA Registered Office - Head Office, Baltic House, Mount Stuart Square, Cardiff CF10 5FH. Tel: 029 2043 1700
Price	Price: £7.50 (£5.00 WCVA members) or free to download from their website http://www.wcva.org.uk/search/results_advanced.cfm
Approach	Self-evaluation for regeneration initiatives
Practical tools	No
Use of case examples	Some examples used to illustrate key points.
Lists additional resources	Short list of further reading provided
Size	16pp
Description	A bilingual (English and Welsh) booklet which works through four levels of evaluation using the analogy of a tree: the roots, the core, the branches and the fruit. Simple but basic introduction to evaluation using relevant examples and making links to Objective 2 of European funding.

Crime reduction

Title	Passport to evaluation: an introduction to evaluating crime reduction initiatives and projects
Developed by	Home Office Crime Reduction Centre
Year published	2002
Developed for	Voluntary/statutory/private sector; particular groups/sub sectors e.g. homeless, health
Available from	Training Resource Solutions, Home Office Crime Reduction Centre, 0870 241 4680 homeoffice@prolog.uk.com
Price	Can be downloaded in sections from www.crimereduction.gov.uk/learningzone/reading.htm#evaluation
Approach	Self-evaluation
Practical tools	
Use of case examples	It includes examples throughout and a case study where readers can practice the key points of evaluation.
Lists additional resources	Limited
Size	112pp
Description	The Passport is a self-learning document that can be worked through in its entirety by those new to evaluation. Those who already have some experience can skip some sections, using the Passport as a reminder. The book contains sections on the context and process of evaluation and looks at other issues to consider. A glossary sets out the definitions of key terms used in the evaluation process.

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, Department of Public Health Sciences, University of Toronto, Health Sciences Building, 155 College Street, Room 400, Toronto, Ontario M5T 3M7. Tel: (416) 978.0522. hc.unit@utoronto.ca www.thcu.ca
Price	Free to download from their website www.thcu.ca/infoandresources/evaluation_resources.htm
Approach	Outcomes monitoring
Practical tools	This workbook includes example documents and work sheets in each section allow 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	102pp
Description	A fairly text heavy workbook providing an overview of key concepts and methods in the development and implementation of program 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	http://www.aidsalliance.org/sw36326.asp
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 HIV/AIDS specific resources signposted
Size	250 pp
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, but other sections also provide tools that can be used for information collection during a (Sections D); Experiential tools (Section E); Prioritisation and quantification tools (Section F) and Action planning tools (Section G).</p> <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>

Homelessness

Title	The Employability Map
Developed by	Triangle Consulting for Off the Streets and Into Work (OSW)
Year published	2004
Developed for	OSW-funded services but could be used by all homelessness organisations running programmes to help homeless people get into employment. OSW are now offering technical support on implementation to other organisations working with homeless people.
Available from	OSW – a leaflet on the programme can be downloaded from the OSW website www.osw.org.uk/librarydocs/OSW_Employability_Map_Flyer_Oct_2004.pdf
Price	Two days training at charity rate £200, inclusive of manual.
Approach	Measuring soft outcomes
Practical tools	<p>The Employability Map consists of a form covering five areas, each graded with a scale. Each scale is divided into three zones, indicating the level of support required by the client in that area. The five areas are:</p> <ul style="list-style-type: none"> • Motivation/sense of direction • Lifestyle • Readiness for work • Basic skills • Skills for finding work <p>In order to complete the form the client and project worker decide together which zone the client falls into on each scale, and then where in the zone they are. The form comes with a detailed description of what kind of behaviours each of the points on the scale represent, to make the process as objective as possible.</p>
Use of case examples	N/A
Lists additional resources	N/A
Size	
Description	<p>There is a training package delivered by OSW for organisations wanting to use the Employability Map. The map is an interactive assessment tool for measuring an individual's progression route to employment and identifying soft outcomes along the way. Its main aims are to:</p> <ul style="list-style-type: none"> • help clients think about where they are on their journey towards work or further training • enable service providers to support individuals on that journey, by looking at how their position on the map changes over time.

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 website
Price	Free to download from www.homelessoutcomes.org.uk
Approach	Measuring soft outcomes
Practical tools	A practical tool for measuring the outcomes of work with homeless people. It is completed by service users with support from key workers. Additional practical tools for use by key worker and managers are provided in the supporting documents that accompany the Outcome Star.
Use of case examples	Examples of completed tools are provided
Lists additional resources	No
Size	20pp 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. 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.</p> <p>The London Housing Foundation has developed a web site dedicated to sharing knowledge about outcomes. The Outcomes Star Collection is available on the web site - www.homelessoutcomes.org.uk.</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 Service
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 Service
Price	Hard copy £12.95 plus 10% pp Download for free from the publications section of the CES website www.ces-vol.org.uk
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	40pp
Description	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. 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.

Infrastructure organisations

Title	Demonstrating the difference
Developed by	Sally Cupitt with Anastasia Mihailidou for the National Performance Programme (NPP)
Year published	Mar 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	http://www.ces-vol.org.uk/downloads/demonstratingthedifference-392-400.pdf
Price	Free to download from CES website
Approach	Outcomes issues for infrastructure organisations
Practical tools	
Use of case examples	Yes
Lists additional resources	Acronyms and some definitions. A bibliography is provided at the end.
Size	60pp
Description	<p>This is a timely research report investigating 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 National Association for Councils for Voluntary Service (now renamed National Association for Voluntary and Community Action - NAVCA)
Year published	2002
Developed for	Councils for Voluntary Service and other infrastructure organisations

Available from	
Price	NAVCA, The Tower, 2 Furnival Square, Sheffield S1 4QL 0114 2787004, navca@navca.org.uk
Approach	Downloadable for free from www.navca.org.uk/publications
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	82pp
Description	<p>This toolkit was devised for (English) Councils of Voluntary Service. It presents a six step guide to self-evaluation, clarifying aims and objectives; identifying outcomes and outputs; indicators; planning monitoring and evaluation; collecting the information, use of the findings.</p> <p>Guidance is given on interviews, case studies, process evaluation, questionnaire analysis and writing reports.</p>

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, 8 All Saints Street, London N1 9RL. Tel: 020 7713 6161. ncvo@ncvo-vol.org.uk
Price	£10.00 (£7.00 NCVO Members) or free to download from their website http://www.ncvo-vol.org.uk/publications/publication.asp?id=5346
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	List of publications and other sources of support and advice are listed
Size	25pp
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	July 2005
Developed for	DFID staff and all partners involved in DFID programmes. Useful for people carrying out international work.
Available from	http://www.dfid.gov.uk/Documents/publications/evaluation/guidance-evaluation.pdf
Price	Free to download from DFID website
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	89pp
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 Chapter 4-6 explains the evaluation process,, terms of reference and roles and skills required 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	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	Direct from Save the Children and other outlets including Amazon
Price	£12.95

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 heads, such as impact assessment, information collection, emergencies
Size	350 pages
Description	<p>This new edition of Toolkits 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 looks 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 GB, Oxfam House, John Smith Drive, Oxford OX4 2JY. Tel: 0870 333 2700
Price	£6.95 (inc. VAT) or free to download from their website http://publications.oxfam.org.uk/oxfam/display.asp?isbn=0855985941
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	74pp plus CD
Description	<p>The guide aims to help field workers address the questions ‘what difference are we making and how do we know?’ 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	Common Methods Used in Impact Assessment
Developed by	Richard Bond, richard.bond@man.ac.uk
Year published	2001
Developed for	Enterprise Development Impact Assessment Information Service info@enterprise-impact.org.uk
Available from	www.enterprise-impact.org.uk
Price	Free to download from the website http://www.enterprise-impact.org.uk/informationresources/toolbox/commonmethodsinia.shtml
Approach	Impact assessment
Practical tools	No
Use of case examples	No
Lists additional resources	Further references are provided
Size	4pp
Description	A summary of ten methods or tools used in assessment exercises, such as Most Significant Change, BDS Performance Measurement Framework, Social Accounting, rolling Baseline, Simplified Cost-Benefit Methods.

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	Independent Evaluation Group Help Desk, World Bank Group, 1818 H Street, N.W., MSN H3-305, Washington, D.C. 20433. Tel: 202-458-4497, eline@worldbank.org
Price	Free to download from their website in English; Arabic; French; Portuguese; Russian; Spanish www.worldbank.org/ieg/ecd/me_tools_and_approaches.html
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	24pp
Description	<p>A simple and basic introduction to monitoring and evaluation, some methods and approaches and data collection methods. Each of following sections is summarised, giving its purpose and use; advantages and disadvantages; costs, skills, and time required; and key references:</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	www.niace.org.uk/publicaitons enquiries@niace.org.uk Tel: 0116 204 4200
Price	Free to download from: www.niace.org.uk/Research/BasicSkills/Projects/Catching-confidence.htm Hard copies no longer available
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 pp
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 their website: www.healthscotland.com/documents/457.aspx
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 around 30pp
Description	<p>The four guides cover the following topics:</p> <ul style="list-style-type: none"> • ‘Evidence-based Practice’ introduces mental health, the evaluation process and evidence-based practice. • ‘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. • ‘Getting Results’ covers planning, designing and conducting an evaluation including types of data and data collection. • ‘Making an Impact’ focuses on analysis and interpretation of results, reporting and writing a research article.

* These two entries have been sourced with permission from the Evaluation Support Scotland website: www.evaluationsupportscotland.org.uk

Mentoring and Befriending

Title	Mentoring: A Guide to Effective Evaluation
Developed by	Andrew Miller, Mentoring and Befriending Foundation
Year published	1999
Developed for	Individuals and organisations wanting to improve mentoring practice and results. It is applicable to a variety of contexts.
Available from	Tel: 0161 787 8600 or email: info@mandbf.org.uk Website: www.mandbf.org.uk
Price	£3 member; £6 non member Can be downloaded for free from the Mentoring and Befriending Foundation website. http://www.mandbf.org.uk/resources/impact_measurement_and_evaluation/
Approach	Self-evaluation and external evaluation
Practical tools	Contains some example questionnaires
Use of case examples	There are five case examples of different types of evaluation of mentoring young people in a variety of contexts, ranging from a large scale national US study to a small-scale local study.
Lists additional resources	Short bibliography and reference, but further resources are listed on the Monitoring and Befriending Foundation website.
Size	23 pages
Description	<p>This guide provides a focused resource on evaluation of mentoring programmes.</p> <p>The first four sections are aimed at beginners wanting to make a start on evaluating their mentoring programme. The final six sections are aimed at those who want to develop beyond the use of end-of-programme questionnaires and includes an external evaluation model.</p> <p>The guide draws on practical experience of evaluation, and suggests evaluation questions, suggests different approaches to measurement and offers practical evaluation tips from people who have been evaluating their mentoring programmes. The final section explains the distinction between monitoring, evaluation and quality assurance.</p> <p>The Pilot Peer Mentoring Report, 2005-2006, also available on the website, provides a useful example of an evaluation, demonstrating the evaluation process, indicators used, and presentation of the findings.</p>

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 http://www.befriending.co.uk/publications.html
Price	Can be downloaded free from: http://www.befriending.co.uk/pdfstore/EVALRESOURCEPACK.pdf
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.</p> <p>The pack is written in five sections. Section 1 discusses agreeing a vision and organisational or project outcomes – the difference you are trying to make. Section 2 examines what kind of evidence will be needed and includes information on selecting indicators and using them to obtain evidence. Section 3 looks at different ways of gathering evidence. Section 4 looks at how to analyse evidence and learn from evaluation. Section 5 examines how to compile monitoring and evaluation reports.</p> <p>Each section provides examples, resources and practical tips.</p>

Older people

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 age group of mid-life and beyond.
Available from	National Institute for Health and Clinical Excellence www.nice.org.uk
Price	Free to download from at www.nice.org.uk/page.aspx?o=518183
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	26pp
Description	This toolkit is designed to encourage practitioners to incorporate measuring impact and effectiveness into their everyday work patterns. It also aims to encourage experienced practitioners to revisit the basics of evaluation. The toolkit is designed to be flexible to allow local issues and needs to be incorporated and for the advice and learning to be applied to different population groups.

Refugee Community Organisations

Title	Becoming more effective - a monitoring and evaluation guide for refugee community organisations
Developed by	Shehnaaz Latif for CES
Year published	Jan 2008
Developed for	RCOs who have little or no experience of monitoring and evaluation
Available from	http://www.ces-vol.org.uk/downloads/becomingmoreeffective-224-231.pdf
Price	Free to download from CES website
Approach	Self-evaluation with a focus on outcomes
Practical tools	Checklists for each section helping you to think about what you need to when you monitor and evaluate your project.
Use of case examples	Yes.
Lists additional resources	Explanation of terms at the end.
Size	36pp
Description	<p>This plain English easy to follow guide describes the CES five steps 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	Nonprofit organisations
Available from	http://www.seedco.org/documents/publications/nvn_toolkit.pdf
Price	Free to download from Seedco website or email toolkit@seedco.org . This is also available as an online resource which provides assessment tools, worksheets, electronic templates and a sample business plan all available at: http://nvn-toolkit.seedco.org/index.php?method=print&page=17
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	262pp
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 organization in particular.</p> <p>Part II of the Toolkit will provide you with step-by-step instructions for developing your business and creating a written plan.</p> <p>Part III of the Toolkit will provide 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. Pull out these sheets as you work through the Toolkit in order to guide your planning process and better understand the concepts.</p> <p>Part V contains the full text of the Recycle-A-Bicycle 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
Developed for	Social enterprises, but can useful for any organisation bringing together elements of social, environmental and economic mission with income-generating strategies.
Available from	New Economics Foundation, 020 7820 6300 www.neweconomics.org
Price	£20
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: Knowledge 45pp; Tools 86pp; Resources 44pp
Description	This toolkit aims to provide social enterprises with the knowledge, tools and resources they need to measure their quality and impact. 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. The pack includes: <ul style="list-style-type: none"> • a participative storyboard and impact map activities, • a guide to more than twenty proving and improving tools, • a bank of outcome indicators, • a CD-Rom primer on Social Return on Investment (SROI).

See also Proving and Improving website www.proveandimprove.org

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. www.neweconomics.org or call Central Books on 0845 458 9910.
Price	£18 for institutions; £12 for individuals (plus 20% PandP; 30% overseas) Bulk orders: 5 copies for £50 (plus 20% PandP; 30% overseas) Can be downloaded for free from www.pluggingtheleaks.org
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 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	134pp
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. 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	Reducing alcohol-related harm in Scotland The evidence base and a logic model for action
Developed by	By Laurence Gruer Director of Public Health Science
Year published	May 2008
Developed for	Health Scotland
Available from	Health Scotland website: http://www.healthscotland.com/uploads/documents/7289-Reducing%20alcohol%20related%20harm%20in%20Scotland.pdf
Price	Downloadable free from website
Approach	Logic modelling
Practical tools	No
Use of case examples	Shows a model for improving long-term alcohol related outcomes in Scotland (logic modelling diagram)
Lists additional resources	No
Size	5pp
Description	<p>Paper briefly describes the growing seriousness of alcohol-related harm in Scotland. It highlights recent relevant work carried out and commissioned by Health Scotland.</p> <p>It describes the development of a logic model as a tool for showing how a range of evidence-informed initiatives might address the various aspects of this complex problem and consequently achieve measurable improvements in health and well-being.</p>

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 website Drug Misuse Information Scotland
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	No

resources	
Size	26pp
Description	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. 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: <i>'Developing a clear strategy to improve monitoring and evaluation of drug and alcohol services in Scotland.'</i>

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 website www.drugmisuse.isdscotland.org
Price	Downloadable for free. Paper copies can also be requested through the 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	4pp per guide
Description	<p>A set of guides covering the following:</p> <ul style="list-style-type: none"> • 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 website www.rand.org only
Price	Download for free at www.rand.org/pubs/technical_reports/TR101/
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 and 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	177pp
Description	This manual provides a model for identifying outcomes in prevention practice. It can be downloaded chapter by chapter. 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 programs.

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 P.O. Box 500, A-1400 Vienna, Austria Email: youthmail@unodc.org
Price	Free to download from their website: www.unodc.org/youthnet/youthnet_action_planning_evaluation.html#youthtools
Approach	Self-evaluation
Practical tools	No
Use of case examples	No
Lists additional resources	Yes
Size	82pp
Description	This guide contains material on the importance of evaluation, the difference between monitoring and evaluation and how to plan an evaluation. 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.

Title	Evaluation guidance for practitioners: a practical guide to evaluating drug education and prevention services for young people*
Developed by	Richard Ives for The Drug Education and Prevention Information Service (DEPIS) team at DrugScope. Funded by the Department of Health.
Year published	2005
Developed for	Practitioners and managers and all those concerned about evaluating their work with young people in drug education and prevention.
Available from	Limited print copies of the handbook are available from DrugScope and Department of Health. Please contact Joanne Bell Joanne.bell@bradford.nhs.uk or Carol Marsh carolm@drugscope.org.uk or free to download from Drugscope website.
Price	Free to download from: www.drugscope.org.uk/
Approach	Self-evaluation
Practical tools	None
Use of case examples	An evaluation planning grid is included.
Lists additional resources	Yes
Size	41pp
Description	An introduction to the process of evaluation. It looks at the basics (what is the difference between monitoring and evaluation) as well as the specifics of evaluating drug education and prevention interventions. The guide sets out key questions to ask at each stage of the evaluation from defining the purpose and scope to presenting results and recommendations and putting them into action. There is also a brief explanation of information collection techniques including literature searches, interviewing, focus groups, participant observation and non-participant observation, games and role-plays, reflective diaries etc.

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 and must be used at least twice to be meaningful.
Available from	Alcohol Concern Contacts: 020 7395 4000, info@alcoholconcern.org.uk
Price	£11
Approach	Outcomes
Practical tools	The Spider is a practical tool in itself
Use of case examples	No
Lists additional resources	No
Size	26pp
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. 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> <p>Training and IT support packages available from Alcohol Concern.</p>

* These three entries have been sourced with permission from the Evaluation Support Scotland website: www.evaluationsupportscotland.org.uk

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	Volunteering England, Regents Wharf, 8 All Saints Street, London N1 9RL www.volunteering.org.uk
Price	£35 plus £2.95pp includes a CD
Approach	Self-evaluation
Practical tools	Sample questionnaires are included
Use of case examples	Case study examples included
Lists additional resources	
Size	130pp
Description	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. The toolkit also explains the research process, secondary data, sampling, interviews, focus groups, volunteer diaries and data analysis in a brief and readable format.

Title	LEAP for Volunteering*
Developed by	Scottish Community Development Centre for Volunteer Centres Scotland
Year published	2003
Developed for	Volunteer centres. However the model has 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	LEAP (Learning, Evaluation and Planning) Scottish Community Development Centre, Suite 329, Baltic Chambers, 50 Wellington Street, Glasgow G2 6HJ
Price	Free to download from their website: http://leap.scdc.org.uk/resources-downloads/
Approach	Learning, Evaluation and Planning; Self-evaluation
Practical tools	No
Use of case examples	Example outcomes and indicators used
Lists additional resources	No
Size	98pp
Description	<p>This planning and participatory self-evaluation tool was developed specifically for volunteer centres and other organisations engaging with volunteers. 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 and aims to help organisations to learn from their experience.</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>

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5. 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	http://www.vawcvs.org/uploads/involving_people_revised_final.pdf
Price	Free to download from website. You can contact VAW for more information: Voluntary Action Westminster Telephone: 020 7723 1216 Email: general@vawcvs.org www.vawcvs.org
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	66pp
Description	This easy to read guide will be useful at the point where you are ready to choose a method to involve people. The guide is divided into 2 main sections: Ways of involving people – one-off Ways of involving people – on-going The last section looks at supporting people in involvement.

Title	Me and my world
Developed by	NECF (National Evaluation of The Children's Fund)
Year published	2004
Developed for	The book is primarily designed as an evaluation tool with younger age groups within the Children's Fund to gather data about how the Fund has impacted on children's lives. It could be adapted to use by other organisations and projects working with children.

Available from	National Evaluation of Children's Fund www.ne-cf.org
Price	Downloadable for free from publications, other resources section of NECF website
Approach	Participatory
Practical tools	This is a workbook for children to complete either on their own or with someone to record their views and feelings
Use of case examples	N/A
Lists additional resources	No
Size	27pp
Description	A simple workbook for children to fill in order to gather information and use as a starting point for conversations with children and young people about what they feel is important in their lives. It has been developed as something that children can complete so that NECF can gather data about how the Children's Fund has impacted on children's lives. The children and young people will then be able to keep this book as a record of their involvement in the national evaluation project.

Title	My gardening diary
Developed by	NECF (National Evaluation of The Children's Fund)
Year published	2005
Developed for	Children's Fund Environmental projects
Available from	National Evaluation of Children's Fund www.ne-cf.org
Price	Downloadable for free from publications, other resources section of NECF website
Approach	Participatory
Practical tools	The whole book is a diary for children to complete.
Use of case examples	N/A
Lists additional resources	No
Size	9pp
Description	A simple booklet in diary format produced by NECF to record children's involvement in a summer environmental project. A good example of how simple clip art can be used and adapted as a creative way of gathering children's views and evaluation data.

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	The Evaluation Cookbook is no longer available as a web based resource. A revised and extended version of the Cookbook is available from http://www.routledgeeducation.com/books/The-Evaluators-Cookbook- isbn9780415453417
Price	\$33.95
Approach	Participatory
Practical tools	Yes
Use of case examples	No
Lists additional resources	No
Size	64pp
Description	<p>This is an invaluable 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 very easy to use and come with suggestions for use and instructions on how to create the equipment needed. 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, 6 Great Clowes Street, Salford M7 1RE. Tel: 0161 834 7841. marion.gattens@thescarmantrust.org
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.

6. Useful websites

Websites containing monitoring and evaluation resources

<p>Care Services Improvement Partnerships http://icn.csip.org.uk/betterCommissioning/index.cfm?pid=186</p>	<p>This site is dedicated to the Outcomes Network, which fosters exchange of information and mutual support to those implementing outcomes approaches in the social care field, building on research and development work undertaken by the Social Policy Research Unit at the University of York. Useful for those wanting to keep abreast with outcomes and public sector commissioning.</p>
<p>Community Evaluation Northern Ireland (CENI) www.ceni.org</p>	<p>CENI provides a range of services in monitoring and evaluation to the voluntary, community and statutory sectors.</p> <p>The website contains a publications catalogue listing over 200 titles, including evaluation titles. It also contains links to other useful websites. It also has an FAQ section on monitoring and evaluation.</p>
<p>Charities Evaluation Service (CES) www.ces-vol.org.uk</p>	<p>CES provides information, advice and training on quality and evaluation systems for the voluntary sector and community sector and its funders. The website answers some basic questions:</p> <ul style="list-style-type: none"> • What is monitoring? • What is evaluation? • Why evaluate? <p>It provides information on the National Outcomes Programme, together with 14 downloadable worked case examples demonstrating aims, objectives, outputs, outcomes and their indicators. There is a range of other downloadable resources and details of training and further publications available to help organisations with their monitoring and evaluation. Downloadable publications include: <i>First Steps in Monitoring and Evaluation</i> and <i>Your Project and its Outcomes</i>.</p>

<p>Evaluation Support Scotland (ESS) www.evaluationsupportscotland.org.uk</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 www.homelessoutcomes.org.uk</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 new Outcomes Star, a tool for measuring the outcomes of work with homeless people.</p>
<p>Intrac http://www.intrac.org/</p>	<p>Intrac is a nonprofit organisation working in the international development and relief sector.</p> <p>Its resource database contains a wide range of resources on international development. There are a range of resources available on research and approaches, evaluation and impact assessment.</p>

<p>M&E News www.mande.co.uk/</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>
<p>Proving and improving www.proveandimprove.org</p>	<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. There are practical tools and guides to download and a ‘tools chart’ to help you compare approaches.</p>
<p>Resources for Methods in Evaluation and Social Research http://gsociology.icaap.org/methods/</p>	<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>
<p>United Kingdom Evaluation Society www.evaluation.org.uk/</p>	<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>

<p>The Urban Institute: Center on Nonprofits and Philanthropy www.urban.org</p>	<p>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.</p> <ul style="list-style-type: none"> • 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 <p>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.</p> <p>All the information is available to download at www.urban.org/center/cnp/Projects/outcomeindicators.cfm The sequence chart is an MS Word document and the table is an MS Excel spreadsheet. The program reports are available as PDFs.</p>
<p>United Way http://national.unitedway.org/outcomes/index.cfm</p>	<p>United Way of America's Outcome Measurement Resource Network offers information, downloadable documents, and links to resources related to the identification and measurement of program and community level outcomes.</p>

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

<p>Community Building Resource Exchange www.commbuild.org</p>	<p>This site is for anyone who works on the problems of distressed neighbourhoods and the problems of poor children and families. It is particularly targeted to those who are interested in the emerging field of community building approaches to neighbourhood development. This site offers a variety of resources, including articles from academic journals, reports, evaluations, case studies, and links to other Internet sites offering related resources.</p>
<p>Evaluation Support Scotland www.evaluationsupportscotland.org.uk</p>	<p>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.</p>
<p>Staff educational development association (SEDA) http://www.seda.ac.uk/ed_devs/vol1/Eval.htm</p>	<p>This site provides a list of online publications including tools for assessment, guidance notes on carrying out evaluations and other online publications.</p>
<p>United Kingdom Evaluation Society (UKES) http://www.evaluation.org.uk/Pub_library/Online_eval.htm</p>	<p>This page on the UKES website has a section on online resources such as publications, toolkits and useful organisations.</p>
<p>The Urban Institute: Center on Nonprofits and Philanthropy http://www.urban.org/center/cnp/projects/outcomeindicators.cfm</p>	<p>This page of the website includes additional online resources on outcome measurement.</p>
<p>University of Dublin, Centre for Nonprofit Management http://www.cnm.tcd.ie/dialogue/projects.php</p>	<p>This site contains a set of practitioner papers on different aspects of evaluation. It also has a very useful bibliography on nonprofit evaluation.</p>