



*Liverpool
Clinical Commissioning Group*

Healthy Liverpool Community Grant Scheme

Evaluation Guidance

2014

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1 INTRODUCTION

1.1 EVALUATION GUIDANCE

1.1.1 What is this guidance?

These guidance notes have been prepared for NHS Liverpool Clinical Commissioning Group (LCCG) to help organisations receiving funding to evaluate and account for their work. It has two functions:

- **It is a simple, structured approach to planning and evaluating your project;**
- **It enables you to provide the required information in a consistent way.**

Using this Guidance and the accompanying Project Plan and Evaluation Template will help you evaluate your project and report on what it achieved with the funding, while keeping that reporting process as simple as possible.

1.1.2 Who is this guidance for?

This guidance is for you if you have funding from Liverpool CCG as part of the Voluntary, Community and Social Enterprise (VCSE) Grant Scheme or similar. **Please read this as soon as you can, because it may affect how you run your project.** It will help you decide how to turn your ideas into activities that can be planned and evaluated. If you are formally contracted to deliver a service to Liverpool CCG this may still be helpful guidance, but please check with your commissioner or in your contract so see if you need to meet other requirements.

Groups are motivated by the wish to improve things in their local community. They want their activities to give people new chances, new skills and new hope so it can sometimes feel as if planning and evaluation get in the way of that.

But good planning improves the chances of your project succeeding. It makes it more likely that the participants will get the most out of your activities. Good evaluation helps you see what worked, so you can do more of it next time. It also helps you understand what didn't, and why, so you don't waste your energy in future.

Good evaluation is not about some people judging others: it's about people with shared goals and values working together, with trust and respect, to keep improving the quality of their work.

Together, good planning *and* good evaluation give your organisation the best chance of succeeding in your project, and of demonstrating its quality and impact. It can help you provide strong evidence of how your project can strengthen wellbeing and so gain support for your work in future.

1.2 EVALUATING YOUR PROJECT

1.2.1 Why do I need to evaluate?

Organisations should use this Guidance and the accompanying Project Plan and Evaluation Template to tell us about their activities for three reasons:

- 1 To **account** for the use of the funds awarded;
- 2 To help **improve** your – and our – future work; and
- 3 To **provide evidence** of the value of your project in health and wellbeing.

Liverpool CCG has a responsibility to allocate resources to improve the health and wellbeing of local people. Funding community projects is one important way of working with people and organisations in Liverpool to make that a reality.

So it's essential that we have a good knowledge of what has happened and what has changed as a result. Only by having an accurate picture of what a funding programme achieves can we invest well in future projects.

The time you spend on evaluation not only helps you know how successful your work has been and report on the use of your funding, it also helps shape better policies and programmes for health and wellbeing in Liverpool.

1.2.2 What do I need to evaluate?

You need to evaluate the activities funded. They may be part of a larger project, and you can use this approach for the whole project if you wish. But you should use this form to report only what you have done with the funds provided by Liverpool CCG.

You need to account for and report two things:

- 1 **The project outputs:** i.e. what you did ([2.2](#) and [3.1](#)); and
- 2 **The project outcomes:** i.e. what happened as a result ([2.3](#) and [3.2](#)).

Each of these is explained in more detail in the relevant sections, and you'll find space to add your own data and information in the Project Plan and Evaluation Template.

Together, the information you collect and give in these sections will be the main evidence for your evaluation. We are also asking you to think about what that evidence means in [section 3.3](#). Here we'd like you to say how you will work in future as a result of the experience of this project. We also want you to tell us how you think we can help you better in future through our support and funding programmes.

When your project is finished, you can use the [evaluation checklist](#) in section 4 to see that you have provided all the information needed.

When you have completed the whole form, please send it by email to:

grants@liverpoolccg.nhs.uk

1.3 HOW CAN I USE THIS FORM?

This guidance is designed to help you plan at the start and evaluate after the end of your project. So it is divided into two main parts:

- **Sections 2.1 to 2.4 are about planning your work;**
- **Sections 3.1 to 3.4 are about evaluating the result.**

At the start of your project, although you should read through this whole document, you need to work with section 2, [Planning your project](#) and complete 2.1-2.4 in the Project Plan and Evaluation Template. This gives a structure to say what you intend to do and how you will evaluate it. Some of this information will be the same as in your application form; sometimes you'll need to consider new issues.

It's important to do this at the start because this is the benchmark against which you can see what happened in practice.

One of the key issues in evaluation is to see how far the things that were planned produced the expected results. It's about establishing a link that shows any good outcomes were not just a happy accident but were intended. Without that, it can be difficult to show that the project is entitled to claim the success.

This will also help you decide what information you need to record as you go along. For instance, if you intend to work with 15 teenagers over a three-month period, one key indicator is whether the young people stay involved. To provide evidence about that, you would need a record of how many people attended.

Most of the information you need to evaluate a project is not difficult to get. But you do need to do two things:

- **Think about what information you need in advance**, including how you can know it and who will collect it; and
- **Collect the information consistently and at the right time**, because incomplete or inaccurate data is worse than no data.

(If you have no data, you know that you don't know anything. If you have some data, but you don't know how accurate it is, you might reach false conclusions.)

You should answer the questions in the Project Plan and Evaluation Template, as fully as necessary, as described by this guidance. Sometimes the answer will be words; sometimes it will be a figure. In many cases there is a column headed 'indicator'. That simply means how you will know if you have achieved what you intend – how you can gather reliable data about what happens.

In this guidance, you'll see **orange boxes** that are already filled in. They use the example of an imaginary youth dance project to give an idea of how these boxes can be completed for your project in the Project Plan and Evaluation Template.

Section [2.4](#) will help you organise what needs to be done to gather data that provides evidence about your project and its impact. Add what you can to the list in 2.4 in the Project Plan and Evaluation Template and print out a copy for everyone who needs to be involved in gathering data so that they all understand why it matters.

Remember: Keep it simple

It is better to collect data well about five or six key aspects of your project, than to collect data inconsistently about 15 or 25 things.

You are being funded to deliver a great project that improves people's wellbeing – never lose sight of that.

Just do the planning and evaluation that is necessary so that you can do good work and demonstrate to others why it was good.

You are very welcome to use this guidance to help you plan and evaluate other projects if it meets your needs and those of the relevant funders.

2 PLANNING

2.1 AIM AND OBJECTIVES

Because there are different ways of describing an aim and objectives, people are sometimes confused about what these terms mean. In this programme, we have a simple approach:

- **Your aim is what you want to achieve, and**
- **Your objectives are the things you need to do to achieve it.**

Neither needs to be long, complicated, or written in 'official' language.

If your aim is to get young people to enjoy keeping fit, say so: that's a great thing to want to do and it doesn't need any titivation. If your objectives (how you're going to do it) are to put on a weekly local dance session and then a street dance performance in the local park, again, that's fine.

It's **your** aim, for **your** project: the first person it has to make sense to is **you**. If you keep it simple and straightforward, it will also make sense to everyone else in the project, including the young people.

Note there is LCC Event Planning guidance available online at:

<http://liverpool.gov.uk/leisure-parks-and-events/events/organising-events/>

2.1.1 Aim

The aim of your project is likely to be how you want to improve things for the people who will take part. You should be able to say what success will look like if you achieve it – your key indicator. Here's an example:

What is your project's aim?	Key indicator of success
Our aim is to get young people to enjoy keeping fit	At least half the young participants want to carry on dancing afterwards

Your project may be more complicated than this, but you should still be able to state its aim simply and how you would know that you've done it.

Now, write the aim of your project in the Project Plan and Evaluation Template

2.1.2 Objectives

As explained above, the objectives are the activities you will do to achieve your aim. So, using the same example of a youth dance group, here are some objectives:

What are your project's objectives?	Indicator
1 To run evening dance sessions at Anywhere Youth Centre every Wednesday from November to February	Record of dance sessions Record of participants' attendance
2 To train 15 young people in hip hop and street dance	Compare their knowledge at the start and at the end
3 To teach them how to dance safely and without causing injuries	Ask them what they know about safe dance and exercise at the end
4 To help them make a performance based on their creative ideas	Note where the ideas come from
5 To put on a show in Anywhere Park for parents and friends on a Saturday afternoon in February	Performance documented in video Audience comments and feedback

As you can see in this example, the objectives are a way of saying what you are going to do. It should also be clear that doing those things is likely to lead to the aim. In other words, it's reasonable to think that if you train young people to put on an exciting dance show, they will want to keep dancing and staying fit afterwards.

Now, write your project's objectives in the Project Plan & Evaluation Template

2.2 PLANNING OUTPUTS: THE ACTIVITIES YOU DELIVER

Setting objectives is a way of planning your activities in detail. From that you should be able to define your project outputs, or the things it will produce. Outputs are straightforward: if you spend some money employing a dance worker, you automatically create an employment output.

What makes outputs different from outcomes – which we'll look at next – is that they are *predictable*. If you do this, you get that; if you spend this money, you produce that output. So long as you do the things that you plan to do, you will deliver the planned outputs – unless you've set yourself unrealistic targets!

Here are some outputs for our example dance project:

Programme outputs	Your project
Number of paid people involved in the delivery of your	2

activity	
Total number of volunteers	12
Number of workshops held	18
Number of people attending workshops	15
Type of participants – eg children, refugees...	24
Funding money spent	£3500
Number of events	1
The total number of audience that attend your event	100
Total 'In kind' match funding	£500
Total other funding	£200

Evidence of whether you have achieved the planned outputs will be in things like your attendance records, project documentation and administrative files, so you shouldn't need to think of other ways to collect this data.

Now write your project's expected outputs in the Project Plan and Evaluation Template

2.3 PLANNING OUTCOMES: THE CHANGE YOU ACHIEVED

Outputs are the first base of evaluation. They tell you whether you did what you said you would do. But they don't tell you what happened as a result. You might run a series of dance workshops and not produce a lasting enthusiasm for dance among the participants.

Knowing that would be very important, since that change is the project aim. Knowing *why* the sessions didn't result in people wanting to do more dance would help you decide how to work differently next time.

Evaluators use the word 'outcomes' to describe change that results from activities. Outcomes are more complex and variable than outputs. They might be intended but they are not predictable. You might also produce outcomes that you didn't plan.

Nor are outcomes necessarily good. Change is sometimes for the worse. Even a good community project might end up with some people falling out. That would certainly be unintended and it would probably be unforeseen. It might not be anyone's 'fault' and it might not have been preventable. But if it's an outcome of the project, it needs to be understood in the evaluation.

More often, outcomes are neither good nor bad *in themselves*. Signs of disagreement within a group of teenagers might have various causes and consequences. It might be, for instance, that some of them are becoming more mature and that change

challenges their current friends. The change itself – helping young people grow and develop more constructive ideas for their future – is a positive thing, but it is evident in group tensions that are not, in themselves, desirable.

The important thing about outcomes is:

- **To be able to say what change a project aims to produce;** and
- **To have ways of observing and recording that change.**

In addition, you should:

- **Be aware of other changes that might be happening;** and
- **Keep asking what you’re seeing might mean.**

We’ll come back to the second two points in section [3.3](#), when you think about what the data you’ve gathered actually means. For now, at the planning stage, you just need to be able to say what change you aim to produce and how you will know.

Outcome examples	Indicator examples
Improve wellbeing of participants	Wellbeing check cards
Participants will try dance, enjoy it and want to continue to dance or take up other activity	Benchmark/baseline and participants feedback sessions Record of sessions
Increase level of physical activity	Benchmark/baseline and participants feedback sessions

There are a number of tools available to you to help you measure outcomes.

THE 5 WAYS TO WELLBEING are a set of actions that international research has proven will improve personal wellbeing when they are a regular part of our lives. They are

- Connect - with the people around you
- Be active – moving makes us feel good.
- Take Notice – of the world around you and how you are feeling
- Keep Learning – new knowledge and skills make us more confident in ourselves
- Give – from doing a favour to raising a smile, helping out makes us feel better.

They are all important in improving how we feel so the more of them you can build into your project for participants, staff and volunteers, the more people involved are likely to improve their wellbeing overall. So if your project can demonstrate that participants regularly experienced all of the five ways to wellbeing, evidence would suggest your project will improve wellbeing. You can also use them in your framework for evaluation. <http://www.neweconomics.org/projects/entry/five-ways-to-well-being>

Here's how the dance project might show outcomes (change) in relation to the five ways to wellbeing:

Outcomes related to the five ways	Indicator
CONNECT	
<p>Our project will involve participants attending different schools and who don't know each other.</p> <p>As a result it will build new social interaction, trust and friendship among the participants.</p>	<p>Record of attendance</p> <p>Participants' feedback after the final show</p> <p>Observation</p>
BE ACTIVE	
<p>The participants will be fitter as a result of being involved in at least 40 hours of physical activity during the project</p> <p>They will enjoy dance and at least half of them will want to continue with it independently (e.g. through local groups or college)</p>	<p>Record of sessions</p> <p>Participants' feedback</p> <p>Observation and session photographs</p> <p>Dance fitness test at beginning and end</p>
TAKE NOTICE	
<p>Our project will encourage participants to be aware of other dancers, the stage and their reactions in learning and performing.</p>	<p>Participants' feedback</p> <p>Observation</p>
KEEP LEARNING	
<p>Young people will learn how to exercise and dance safely, without putting undue strain on their bodies.</p> <p>They will also learn creative dance movements and how to devise a performance piece.</p> <p>Some of the group may learn about sound and light technology and other aspects of putting on a show.</p>	<p>Delivery of session plans</p> <p>Observation of new skills gained</p> <p>Participants' feedback</p>
GIVE	
<p>Friends and parents will be invited to help on the performance night</p>	<p>Record of those helping</p>

WEMWBS

To help understand the effect for wellbeing we can use 7 standard questions (the short Warwick and Edinburgh Mental Wellbeing Scale). We've put them together as a [Wellbeing Check Card](#) to make it easy. Asking these at the start of the project and repeating them at the end will help you to report change. Please ask participants to complete a [Wellbeing Check Card](#) this is really easy to do. You can then summarise this information in your final report using the [excel table provided in 3.2](#). This is vital to helping us understand the outcome for participants and demonstrating what has been achieved. You might also want to use this to look at wellbeing with volunteers. You

can use the [wellbeing check card](#) for people aged 13 and over. You can get copies of the questions as a postcard for free by emailing grants@liverpoolccg.nhs.uk

NHS Liverpool CCG has approval for all of our grant projects to use WEMWBS for free and have completed the necessary documentation on your behalf. We will be looking to collate wellbeing data from each project and across the whole grant programme to help understand what the outcomes are. We would like as many projects as possible to use this tool for participants, staff and volunteers as appropriate. It may be helpful to allocate people an ID number so it is easier to track progress over the life of the project. It is also important to respect the confidentiality of responses and gain consent to help with this information gathering.

Detailed guidance on use of this WEMWBS is available in this document:

<http://www.healthscotland.com/uploads/documents/19559-WEMWBS%20practitioner-based%20user%20guide%20for%20evaluation%20Sept%202012.pdf>

OTHER EVALUATION FRAMEWORKS AND MEASURES THAT COULD BE USED ARE LISTED BELOW.

PHYSICAL ACTIVITY can transform our physical and mental health. To get those benefits we need to be active enough. For adults that is at least 2½ hours a week of moderately intensive activity (brisk walking or cycling). More detail at <http://www.nhs.uk/Livewell/fitness/Pages/physical-activity-guidelines-for-adults.aspx> To measure whether you have increased physical activity through your project please ask at the start and end of the project

- How many days per week are you doing any physical activity?
- On those days how long are you active for?

OUTCOMES STAR is a set of tools for supporting and measuring change when working with people. Participants score themselves out of 10 against a set of relevant themes such as emotional wellbeing, physical health, home and money etc. Visually the themes are arranged around a star and people can see their change easily from the start to end of a project. There are over 20 versions of the outcomes star adapted for different people and services such as older people, mental health, families work etc. To use this framework you need to register and buy a licence.

www.outcomesstar.org.uk

EQ-5D: The EQ-5D is an internationally recognised measure of 'quality of life'. It is widely used within research and adopted as the main measure in the NHS to look for improvements in quality of life of people taking part in a health intervention. It is a questionnaire that asks clients to score themselves out of 5 on a set of 5 questions relating to mobility, self-care, usual activities, pain and discomfort, anxiety and depression. The questionnaire is completed before and after taking part in the intervention. It is then possible to see if there has been a change in the person's quality of life score. You need to register to use EQ-5D and in some instances there may be a fee.

<http://www.euroqol.org/eq-5d-products/how-to-obtain-eq-5d.html>

Now, go to the Project Plan and Evaluation Template to complete this table for your own project

If you've got to this part of the form and completed each blue section in the Project Plan and Evaluation Template, you have nearly finished the preparation you need to evaluate your project. We hope that thinking about your project in this way has helped you in planning what you will do.

We also hope this process has given you a better understanding of what is needed in terms of evaluation and that you feel confident to do that part of the task.

The last task to be done at this stage is to make a note of how you will collect the data you need: that is covered in the next section.

2.4 PLANNING THE EVALUATION

2.4.1 Collecting data

It can be tricky to think through a project's aim, how its activities will achieve it, and what will change as a result. But, having made those choices, it's time to focus on organisation: how will you collect the information that you have decided you need? Whose job will it be? When must it be done?

In the last section, you worked out what information you needed for your project. Now we need to look at the methods you can use.

Going back to the example dance project, here are all the outputs listed, as well as the indicators of change that were proposed:

- Record of dance sessions
- Record of participants' attendance
- Compare their knowledge at the start and at the end
- Compare participants' [wellbeing at the start and at the end](#)
- Ask them what they know about safe dance and exercise at the end
- Note where the ideas come from
- Performance documented in video
- Audience comments and feedback
- Number of paid people involved in the delivery of your activity
- Total number of volunteers
- Number of workshops held
- Number of people attending workshops
- Number of events
- Type of participants
- [Funding / money spent](#)
- The total number of audience that attend your event
- Total 'In kind' match funding
- Total other funding
- Record of attendance
- Participants' feedback after the final show
- Observation
- Record of sessions
- Participants' feedback

- Observation and session photographs
- Dance fitness test at beginning and end
- Delivery of session plans
- Observation of new skills gained
- Participants' feedback

At first sight, that's a long list of things to try to keep track of, but it can be simplified. In fact most of those things can be recorded in a small number of evaluation methods as this table shows:

Data to be gathered	Method
Record of dance sessions Record of participants' attendance	Session log book
Compare their knowledge at the start and at the end	Benchmarking session
Ask them what they know about safe dance and exercise at the end	Benchmarking session
Data to be gathered	Method
Compare participants' wellbeing at the start and end	Benchmarking session – use wellbeing check
Note where the ideas come from	Observation
Performance documented in video Audience comments and feedback	Visual documentation Audience survey card
Number of paid people involved in the delivery	Project admin records
Total number of volunteers	Project admin records
Number of workshops held	Session log book
Number of people attending workshops	Session log book
Number of events	Session log book
The total number of audience that attend your event	Observation
Total 'In kind' match funding	Session log book
Total other funding	Project admin records
Record of attendance Participants' feedback after the final show	Session log book Final participants' feedback session
Funding spent	Project admin records
Record of sessions Participants' feedback Observation and session photographs Dance fitness test at beginning and end	Session log book Final participants' feedback session Visual documentation
Delivery of session plans Observation of new skills gained	Final participants' feedback session

From this, you can see that most of the data you need to collect can be done through five or six main methods. These are explained in a little more detail below.

2.4.2 Methods for recording data

Collecting reliable data about evaluation is not difficult, but it does involve preparation, organisation and consistency. You've done the preparation, in the last section on planning. Now you're going to do the organisation. After that, consistency will be up to you.

Here are some simple ways of collecting the data you need. Some projects might not use all of these methods; others might use methods not described here. Professional evaluators use a variety of more or less sophisticated tools, but what is described here will be enough for this programme.

Session logbook or diary

Keeping a record of what happens at your sessions is the easiest, and perhaps the most useful, way of recording data about your activities. A simple notebook, with a page for each session, will enable the project leader to record:

- Dates and time of sessions
- Session leaders, volunteers and participants
- Names of the people who took part
- The activities that took place
- Any incidents, stories or things that were said
- Results from observation (see below)
- Personal impressions about atmosphere

The logbook might be a personal or organisational document that is kept private because it contains confidential information (such as participants' contact details).

But you can also use a big scrapbook in which everyone is invited to write or draw at the end of a session and that gives a chance to reflect on and talk about what has happened.

Observation

We observe all the time, and we draw conclusions from those observations. Project leaders, artists, volunteers (as well as the participants) are all watching and listening to what's going on.

That information is important, especially if you know what you are looking for. So you might, one session, pay special attention to how well everyone is getting on: are they mixing and making friends? Another time you might observe how interested people seem to be: what is the quality of attention they're giving to the workshop?

It's worth spending a bit of time after each session to share impressions with others who are responsible for the activity, such as the artist or your volunteers. The results of those discussions can be noted in the logbook.

Visual documentation

Photographs and video recording are useful not just for documenting what happened for people who weren't there; they are also a valuable source of information. From session photographs, you may be able to see how the group has changed over the weeks: perhaps you see more smiles as people have got to know each other.

You can also use photographs or video as a way to start a conversation with participants about the project. Show some pictures from past workshops and ask people what's going on, or what they remember about the session. They'll often find it easier to talk about their experience with such visual prompts.

You can also give the camera to the participants to take their own photos. You can learn a lot about their perspective from what they choose to photograph, especially if you talk to them afterwards about what they've done.

Finally, don't forget that photographs can be useful in reporting. A couple of photos of a final performance can communicate a lot to someone who wasn't there, including much that can't easily be put into words.

Don't forget though to get people's consent for photography before you start, and to explain what you'll do with the images.

Project admin records

Every project or organisation keeps records, if only of money coming in and going out. The programme expects funded organisations to have various policy statements and other documents, so as to be within the law. Keeping on top of this admin work is important in itself, but it also helps to provide records that can be used in evaluation.

For example, if you make a brief note of meetings to add to the project file, it will be much easier to trace its development afterwards. Six months on, people might have forgotten some of their original expectations or ideas; a note is a reminder that can help them to think about why things changed or weren't fulfilled.

Finances

At the end of the project we will ask you to confirm the money that you spent. You should keep all of the receipts and payments made with Liverpool PCT funding. We will check the paperwork in detail for a proportion of projects so you should assume you will be asked for all of this. See further guidance [5.2](#)

Benchmarking/Baseline/Before session

This is a really important one. When a project is intended to support people to change or learn, it is essential to have a snapshot of where people are at the start and to repeat this at the end to understand what changes happened. The first session of a programme is an opportunity for people to get to know one another, to think about what they're going to do, and to share their hopes. It can also provide a benchmark to go back to at the end. The simplest method of benchmarking is a group conversation in which you note the key things that people say.

There are lots of other approaches to benchmarking:

- Get everyone to draw a picture of themselves in the world today; the same exercise can be repeated at the end of the project and people can reflect on the differences between the two images;
- Ask people to complete a self-portrait questionnaire, but make it fun and creative, so that they are describing, for example, their favourite films or music as well as telling you about their past experience of dance or attitudes to drugs;
- Use physical games, where people line up or position themselves in a room depending on certain criteria: for instance, how much they enjoy dance or how confident they feel about performing in front of strangers;
- Set up a diary room with a video camera that everyone can go and talk to about their experience of the project.

If you are looking to improve wellbeing, or physical activity or quality of life your benchmarking session is likely to be when you ask people to complete their first wellbeing check cards or other tools (refer back to [2.3](#)).

These are just a few ideas that have been used in other projects. The colleagues you work with on your project will probably have their own suggestions. Whatever your approach though, you'll find it invaluable at the end of the process to be able to look back at where you all were at the start.

Final participants' feedback session

The final session is an important opportunity to bring a project to a close. It's natural in doing that to reflect on the journey that everyone has been through and to talk about where they might go next, individually or as a group. You can use the same methods to engage people in that reflection as were tried at the beginning. By now, you'll also have a better idea of what works well and what is not so successful. At this stage you should ask participants to fill in the [wellbeing check card](#) and/or the physical activity quality of life assessments (refer back to [2.3](#)).

Take your time over this final session. Make sure that people understand its importance to them as well as you because it is a key part of the learning process.

Stories of an individual’s journey while taking part in your project can be a hugely effective way of communicating what you have achieved.

Volunteer views

Volunteers are a key part of projects and their views and experiences will be an important part of understanding what has taken place. Think about how you will capture their reflections both in terms of project delivery and participant experience and also how they themselves have felt about their experience.

If you are using questionnaires of any kind, try to:

- **Avoid leading questions** (i.e. that point towards the desired or ‘right’ answer);
- **Use simple language and concepts;**
- **Pilot your questionnaire before use.**

Finally

Gathering data is easy. It is also easy to gather data that is problematic because it’s inaccurate, you have too much of it to use, it doesn’t tell you what you need to know or any number of other weaknesses. So remember:

- **Only gather data you have clear need and use for;**
- **Keep your data to the minimum necessary;** you can get 80% of what you need to know quite easily, but the remaining 20% might take you much more effort. So is that last 20% really worth it?
- **Try not to let your need for data to interfere with the activity;** evaluation serves the project, which is what all this is about.

2.4.3 Organising the collection of data

Plan your own data collection by filling in table 2.4 in the Project Plan and Evaluation Template showing how you will collect the data you need

Overall responsibility for evaluation and reporting		
Who’s in charge?	Named person	J Bloggs
Benchmarking/Baseline session		
Is this needed?	Yes required	Yes
Whose job?	Named person	M White
When?	Dates	1 st session – 8 th Nov
Preparation?	Tools/equipment	Brief team
Anything else?	Other details	
Wellbeing Check Cards		
Is this needed?	Usually required	Yes

Whose job?	Named person	J Bloggs
When?	Dates	Before 1 st session
Preparation?	Cards	Order cards from PCT/ brief team
Anything else?	Other details	
Session logbook or diary		
Is this needed?	Yes required	Yes
Whose job?	Named person	M White
When?	Dates	At the end of every session
Preparation?	Tools/equipment	Buy log book / brief team
Anything else?	Other details	M White to gather info from team
Observation		
Is this needed?	Yes or No	Yes
Whose job?	Named person	M White and all sessional workers
When?	Dates	Every session
Preparation?	Tools/equipment	Log book – brief team as to what to note
Anything else?	Other details	
Visual documentation		
Is this needed?	Yes or No	Yes
Whose job?	Named person	J Bloggs
When?	Dates	Celebration event / final session
Preparation?	Tools/equipment	Borrow flip camera
Anything else?	Other details	Train team to do vox pops of participants
Project admin records		
Is this needed?	Yes required	Yes
Whose job?	Named person	J Bloggs
When?	Dates	At each session and for expenditure
Preparation?	Tools/equipment	Spreadsheet to be set up
Anything else?	Other details	Team to be briefed
Final participants' feedback session		
Is this needed?	Usually required	Yes
Whose job?	Named person	J Bloggs
When?	Dates	At final session
Preparation?	Tools/equipment	Post-it notes, pictures, wellbeing check cards

Anything else?	Other details	Order more wellbeing cards in advance
Audience survey		
Is this needed?	Yes or No	No
Whose job?	Named person	
When?	Dates	
Preparation?	Tools/equipment	
Anything else?	Other details	

3 EVALUATING

Now the project is complete, you can look back and see what has been achieved and how you might build on that in future. To do that, you (and we) need a clear picture of both the [outputs](#) (all the activities you did) and the [outcomes](#) (the changes that happened as a result).

With that information clear, you can think about [what it means](#), what you (and we) can learn from your experience. Learning is a crucial, and often neglected, purpose of evaluation. But only by looking clearly and honestly at what we've done can we expect to build on success and avoid disappointment in future work.

So, as you complete the following sections of this report, please be as clear and honest as you can – and as you would want us to be with you. If things have not worked as well as you'd hoped, please say so: we can all learn from that. We can't learn from incomplete data or over-optimistic reports. Nor can we build the mutual trust that is essential to good work.

3.1 RECORDING PROJECT OUTPUTS

In the Project Plan & Evaluation Template please tell us which methods you used to collect data on your project, and the outputs from your project.

If your project produced outputs that you did not expect (and were not included in your planning), please list them and any other comments.

3.2 RECORDING PROJECT OUTCOMES

Having reported on the outputs of your activities, now you can show what changed as a result. Look back at the [indicators](#) you set in planning your project, and let us know what actually happened. Please also tell us about any unplanned outcomes that you observed in the second box.

In the Project Plan & Evaluation Template section 3.2 please describe the outcomes you observed from your project and how your project provided opportunities to experience the five ways to wellbeing.

Did your project change feelings of wellbeing among participants?

At the start, middle and end of your project you asked participants to complete the wellbeing check card. Please fill out the simple table and excel sheet to demonstrate the effect your project had.

How many completed cards do you have from the start of the project?	
How many completed cards do you have from the middle of the project?	
How many completed cards do you have from the end of the project?	

Now enter the responses from the cards into this excel sheet and attach this with your progress report. (Click on the icon below and an excel sheet will open. Fill in the forms as shown on the sheet – save regularly to your own machine as you would any new file and then attach to your evaluation).



wellbeing check
form.xls

Where a participants wellbeing has increased, you may want to ask for more details of their story, in the feedback sessions for instance, and to write up their experiences as a case study to help communicate what you have achieved.

3.3 EVALUATION: WHAT WE'VE LEARNED

Finally, use the spaces at the end of the Project Plan and Evaluation template to think about your project, what it achieved and how your experience may affect how you will do things in future.

Please answer each question about your project as set out in the Project Plan and Evaluation Template.

And then

Please tell us about the programme you received funding as part of, by completing the questions about this in the Project Plan & Evaluation Template

3.4 REPORTING – TWO STAGES

3.4.1 Submitting your project plan:

Within a month of starting your project, please complete section A: 1-2.4 of the Project Plan and Evaluation Template, and send it to

grants@liverpoolccg.nhs.uk

3.4.2 Submitting your evaluation report:

When your evaluation report is due fill in section B: 3.1- 3.3 of the Evaluation Template and the excel sheet in 3.2 and send it to

grants@liverpoolccg.nhs.uk

Please check we have received this either by email or phone.

3.4.3 What happens next?

We will collate all responses and produce an overall evaluation of the project. We will send you this draft report for comments. We will use the final version to inform future planning.

4 AN EVALUATION CHECKLIST

This checklist is intended to help you plan and evaluate your project. It doesn't cover every aspect or remind you of everything you need to do: it's just a useful reminder of the main points in this guidance.

Planning the project

- Set an aim (change) and objectives (activities)
- Check that the aim would be achieved if you delivered the objectives
- Keep it simple and clear
- Use language that people understand and relate to
- Be realistic about what you can achieve

Planning the evaluation

- Decide what outputs will be produced
- Set the project's outcomes
- Set outcomes relating to the five ways to wellbeing
- Review your output and outcome indicators

Recording data

- Decide what methods you will use to record information against your indicators
- Agree who will be responsible for the overall evaluation
- Agree whose job it is to collect each specific kind of data
- Think about what you're taking on
- Check whether you can do without anything that you've planned

Evaluation and reporting

- Complete the section on evaluation methods
- Complete the section on outputs
- Complete the section on outcomes
- Write up your answers to the questions about what you've learned
- Include equalities forms (below)
- Submit your evaluation report

A Way of Assessing Wellbeing – Wellbeing Check

The following questions can be used at the start (middle) and end of your project to help show whether wellbeing has been affected by the project. They can be an important part of benchmarking and final participant feedback sessions. You can use them with people aged 13 and over. You can ask for copies of this as postcards, for free, by emailing grants@liverpoolccg.nhs.uk and say how many you need.

How are you?

Please tick the boxes that feel right for you.

Over the last two weeks I've been...	None of the time	Rarely	Some of the time	Often	All of the time
feeling optimistic about the future	<input type="checkbox"/>				
feeling useful	<input type="checkbox"/>				
feeling relaxed	<input type="checkbox"/>				
dealing with problems well	<input type="checkbox"/>				
thinking clearly	<input type="checkbox"/>				
feeling close to other people	<input type="checkbox"/>				
able to make up my own mind about things	<input type="checkbox"/>				

Female: Male: Age: Postcode: Date:

Based on the Warwick-Edinburgh Mental Wellbeing Scale: <http://www.healthscotland.com/documents/1467.aspx>

Further Information

4.1 EXPLAINING THE LANGUAGE

Aim	An aim is the ultimate goal of an activity. For projects (rather than organisations), there should just be one aim, which can be achieved through specified objectives.
Objectives	An objective is high level activity that has to be done to achieve an aim; objectives can be broken down into the actual tasks that people will do if a detailed plan is necessary.
Indicator	An indicator reveals whether progress has been made towards a given objective; they may relate to inputs, outputs or outcomes.
Inputs	Inputs are the resources applied to achieving the objectives, such as money, materials and staff time.
Outputs	Outputs are produced as a result of an activity—e.g. the number of workshops, participants, volunteers, employment days etc.
Outcomes	Outcomes are the change that your project intends to produce. That change can be seen through indicators that may not in themselves always seem positive but show positive final results.

4.2 FINANCIAL/CASH HANDLING GUIDELINES

Record all of your transactions, keep receipts and invoices and relate them to your bank statement.

Avoid paying cash. If you do have to pay in cash, make sure you get and keep a receipt / invoice with name, address, email and other contact details. Remember to include these costs in adding up your running total of spend.

Record all payments that the funding relates to.

Good evidence for payment includes:

- Dated, headed, signed and addressed invoices with the amount and description of items / services supplied.
- Receipts (if handwritten with address and amount of recipient)
- Bank transaction statements showing expenditure.

These are not acceptable as records:

- Handwritten receipts with no details on.
- Invoices with no addresses or descriptions of items / services supplied.

- Illegible / unclear receipts
- Excessive petrol receipts with no justification
- Payments not matching original budget and project description.

Useful Information:

<http://www.charitycommission.gov.uk/publications/cc8.aspx>

4.3 FIVE WAYS TO WELLBEING

The following are the Five Ways to Wellbeing developed by the New Economics Foundation and proven to support wellbeing when build into our everyday lives.

Connect

With the people around you. With family, friends, colleagues and neighbours. At home, work, school or in your local community. Think of these as the cornerstones of your life and invest time in developing them. building these connections will support and enrich you every day.

Be active...

Go for a walk or run. Step outside. Cycle. Play a game. Garden. Dance. Exercising makes you feel good. Most importantly, discover a physical activity you enjoy and one that suits your level of mobility and fitness.

Take notice...

Be curious. Catch sight of the beautiful. Remark on the unusual. Notice the changing seasons. Savour the moment, whether you are walking to work, eating lunch or talking to friends. Be aware of the world around you and what you are feeling. Reflecting on your experiences will help you appreciate what matters to you.

Keep learning...

Try something new. Rediscover an old interest. Sign up for that course. Take on a different responsibility at work. Fix a bike. Learn to play an instrument or how to cook your favourite food. Set a challenge you will enjoy achieving. Learning new things will make you more confident as well as being fun.

Give...

Do something nice for a friend, or a stranger. Thanks someone. Smile. Volunteer your time. Join a community group. Look out as well as in. Seeing yourself, and your happiness, linked to the wider community can be incredibly rewarding and creates connections with the people around you.

Guidance Ends

This document was developed for use by the NHS in Liverpool and our partners.

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Thanks to Francois for excellent support in this process and for allowing NHS Liverpool CCG to disrupt the flow of the original by inserting additional reporting requirements.