

**CHARLESTOWN AND LOWER KERSAL NDC PARTNERSHIP**

**MAINSTREAMING / EVALUATION TOOLKIT**





# MAINSTREAMING / EVALUATION TOOLKIT

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## INTRODUCTION

Charlestown and Lower Kersal NDC has funded around 120 projects in the local area over the last 8 years. These projects have made a difference to the area and the lives of the people who live there, not only in the eyes of local residents, but also in the statistical measures of health, education, economy, crime, community and physical environment.

This difference can be seen to be meaningful and often substantial in comparison with the rest of the City of Salford, other similar areas across the country and even England as a whole.

However, although evaluation shows that the programme is heading in the right direction, the journey is not complete. Information from evaluation should also help projects in their own succession proposals, allowing them to prove their worth, evidence the need, and form the basis of tenders or funding bids.

The NDC Succession Strategy includes both sustaining the benefit which has already been achieved, and working towards a post 2011 vision of continued community influence; being part of neighbourhood working arrangements; and the continuation of the community's role in physical development. The successful transition of individual projects from NDC grant to other funding or income sources, will be a key part of ensuring that improvements made within the NDC area will be sustained beyond Government funding and into the long term.

This toolkit **Aims** to link evaluation planning and reporting with the expectations of commissioners and potential funders, in order that any project evaluation work will support and provide the required intelligence for the transition process towards future funding arrangements.

The **Target Groups / projects** for this toolkit include those organisations managing NDC funded projects or operational in the NDC area, and looking towards mainstreaming / commissioning.

## **SECTION 1: PLANNING YOUR EVALUATION AND REPORTING**

### ***What is evaluation?***

Gathering evidence to measure the value and quality of your project, in order to show:

- What works and why?
- What didn't work and why?
- What has been done for those involved?
- What difference is / did the project make?
- What has been learned?
- How the money has been put to good and effective use?
- What would you do differently next time?
- How can you improve your service or deliver it elsewhere?

### ***Why?***

Evaluation, including proving your impact and improving your service, is a key element of good business planning. Specifically, if your organisation or project creates social, environmental or economic benefit in the course of what it does, you should be able to make the case for winning new or further business.

Commissioners are increasingly looking at more than just competitive costs, but instead focussing on outcomes - the difference that your service / project will make. They will be looking for a service to have a specific outcome or meet a specific need, so if you can prove that your work is already having a similar outcome, then you should be able to demonstrate that you can deliver a service they will pay for.

### ***How?***

This toolkit suggests that you follow the following stages:

## STEP 1: Determine what you need most from your evaluation

The following criteria are key issues which you could look to report on through your evaluation:

Issue	Description	How might you evaluate this
<b>Outcome</b>	<p>The difference that your project is making to key beneficiaries, or the change that is caused by your work such as:</p> <ul style="list-style-type: none"> <li>• Increased community capacity</li> <li>• Improved health</li> <li>• Increased skills</li> <li>• Improved environment</li> <li>• Increases in levels of qualification</li> </ul>	<ul style="list-style-type: none"> <li>• Set out what difference your project is intended to make - either physical change or benefit to people (or both?)</li> <li>• Decide how you might measure this, by selecting a number of indicator measures that you can collect</li> <li>• Include both quantitative (statistical or numerical measures) and qualitative (what people think) measures</li> <li>• Record any data which you might have had at the beginning of your project for any of these indicators (this is known as the baseline, from which you might be able to measure the size of any change)</li> <li>• Collect data, preferably as your project progresses, for all the indicators</li> <li>• Carry out any special surveys which might be required, for example of clients / beneficiaries' feedback</li> <li>• Prepare a report which lists the outcomes and reports on progress with each one using the evidence that you have from your indicators. Draw conclusions about how your project is delivering the outcomes.</li> <li>• Where possible, make observations about any unplanned outcomes - describe where there are unexpected benefits from your work</li> </ul>
<b>Local Area Agreement (LAA targets)</b>	<p>Local Area Agreements are three-year written agreements between a local authority area and central Government, which are intended to make people's lives better and improve services. They contain priorities and targets agreed between all</p>	<ul style="list-style-type: none"> <li>• Projects which are currently funded by the New Deal programme must be able to demonstrate delivery of LAA indicators, if they are to receive similar funding in the future from the City Council or Salford Strategic Partnership.</li> <li>• Map your project against the list of targets in the Salford Agreement, a simple table will do</li> <li>• Use your evaluation to report on how you are already or could in the future, help deliver these targets</li> <li>• Where possible, use evidence of what you have done already - the</li> </ul>

	<p>the main public sector agencies working in the area and Government.</p> <p>Salford Targets include:</p> <ul style="list-style-type: none"> <li>• Reduced levels of teenage pregnancy</li> <li>• Reduced levels of crime</li> <li>• Reduced levels of smoking</li> <li>• Reduced child poverty</li> </ul>	<p>outcomes that you have already achieved and collected relevant data.</p> <ul style="list-style-type: none"> <li>• If necessary, modify your target outcomes, and the indicators that you have selected in order to better show how you measure up to LAA targets</li> <li>• In your evaluation, provide information about how you have achieved these outcomes</li> <li>• Bear in mind that LAAs use a set of nationally set out indicators - which you may not be able to measure exactly for your project / area. If this is the case, choose one or more other similar indicators, using which you can demonstrate that you are delivering against the key issues such as worklessness, teenage pregnancy, etc</li> </ul> <p><b>PLEASE SEE APPENDIX 2 FOR MORE INFORMATION ON THE SALFORD AGREEMENT</b></p>
<b>Community benefit / opinion</b>	Evidence of what users / clients thought of your project / service	<ul style="list-style-type: none"> <li>• Commissioners will be looking to see both what people thought of your project and what benefit they actually gained</li> <li>• Consider collecting both facts and figures about community benefit, but also collect opinions, feedback from participants and clients.</li> <li>• Collect more than just satisfaction 'happy sheets', try to find out what a service or project meant to them , how it changed what they do, how they feel or what they have (such as a job)</li> <li>• Map the statistics against the opinions - can you see an impact on trends such as worklessness, health conditions, etc in your participants?</li> <li>• Consider using case studies of individual participants to illustrate the impact</li> </ul>
<b>Value for money / economic return</b>	How to map social impact in economic terms	<ul style="list-style-type: none"> <li>• Having said that commissioners are interested in outcomes, they will also respond favourably if you can provide some measures of value for money for their investment.</li> <li>• These could be positive financial gains, such as match funding or income, or taxation of people in employment</li> <li>• They could also be savings, such as in prescription costs, hospital</li> </ul>

		<p>admissions, or cost of benefits</p> <ul style="list-style-type: none"> <li>• Or efficiency gains, such as reduced waiting lists, reduction in the number of GP attendances</li> <li>• Consider preparing a financial impact map, by taking the outcomes that you have achieved, and seeing if there are any financial measures and calculations that you can use. For example, improved health in 10 people leading to a reduction in prescription costs of £200 / month</li> <li>• Where possible, look for comparisons from elsewhere, to see if what you are doing is good or not!</li> <li>• Tools such as Social Return on Investment (SROI) or Social Accounting are useful for measuring added value</li> </ul>
<b><i>Efficiency and effectiveness</i></b>	Quality and how well the project worked?	<ul style="list-style-type: none"> <li>• A simple way of measuring efficiency, would be to analyse performance against the output, milestone and financial targets from your contract with NDC.</li> <li>• Another way would be to list the policies and procedures which you have in place, and provide an analysis of compliance with these policies</li> <li>• Quality tools such as PQASSO, will provide an assessment of the quality and compliance of your organisation</li> <li>• As stated above, tools such as Social Return on Investment (SROI) or Social Accounting are useful and provide an independent assessment of how well your project has worked</li> <li>• Commissioners may also be interested in how you carried out your project or service, so it is useful to document your procedures anyway, even at this stage if you do not go on to evaluate them.</li> </ul>
<b><i>Evidence of partnership working</i></b>	How the project worked with others and support from key stakeholders	<ul style="list-style-type: none"> <li>• List the partners with whom you have worked, and describe their role in your project</li> <li>• Evaluation should assess how effective any partnership working has been, and include what worked well or did not work well</li> <li>• Letters of endorsement from partners would be useful in making your case to commissioners, as would any feedback / quotations from them. Consider a stakeholder survey which picks up feedback from partner</li> </ul>

		<p>agencies, as well as users of your service.</p> <ul style="list-style-type: none"> <li>• If you have won any awards or gained recognition for your work, make sure that you document this too.</li> </ul>
<b><i>Innovation</i></b>	What you did that was new and successful	<ul style="list-style-type: none"> <li>• Has your project done anything which you think is new and innovative? If so, your evaluation should capture the details of this</li> <li>• Case studies are a powerful way of describing what you did, how it differed from other approaches that have been done before, and how / why it was successful</li> <li>• Evaluation could also explain how the project could be done again elsewhere</li> </ul>
<b><i>Transferability</i></b>	In terms of how your project / service operated, what elements could work elsewhere.	<ul style="list-style-type: none"> <li>• If you are hoping to repeat your project somewhere else, evaluation could contain an assessment of how it might work in a different set of conditions</li> <li>• Effectively, you need to know what worked and what did not and why, to be convincing about transferring your project somewhere else.</li> <li>• Evaluation could look at whether your project could be commissioned 'off the shelf' or whether it needs to be reconfigured to reflect a new set of conditions or area</li> <li>• In some cases, only the learning from a project can be transferred, because evaluation has found that the project was specifically tailored to a particular area, and the specific need or infrastructure is different somewhere else.</li> </ul>
<b><i>Risk Management</i></b>	How well did you manage the risks which you anticipated at the start of the project?	<ul style="list-style-type: none"> <li>• Linked to the assessment of quality, could be one which looks at how well you managed your project, and in particular how well you managed what you thought would be the risks at the beginning of the project or service.</li> <li>• To do this, list the risks, and comment and provide evidence on how well you managed this so that it did not affect the performance. Commissioners will be interested in how you managed the risks.</li> <li>• For example, if you thought that recruiting suitable staff might be a problem, explain how you went about getting the right staff.</li> </ul>

<b>Key selling points</b>	Bearing all your evaluation in mind, what are the key things that you could 'sell' to a potential funder or commissioner?	Bearing in mind all of the above, what do you feel are your key selling points? <ul style="list-style-type: none"> <li>• What are you confident about offering to others?</li> <li>• Can you evidence a track record of success?</li> <li>• How does this fit with what customers / commissioners might want to pay for?</li> <li>• Does anyone else offer this project / service, or are you the only one in this area?</li> </ul>
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## STEP 2: Use what's there / windows of opportunity

Having decided what you need to get from your evaluation work, take stock of what might already be available to you in terms of:

- **Resources within your organisation itself** - build it into your business planning, embed it into the roles of new or existing staff,
- **Information which you may already have** or be collecting - feedback from users, outputs and financial information for NDC monitoring, photographs of events, etc
- **Commissioning or funding opportunities** which might guide what you need for evaluation - tailor your reporting towards the interests of your target funders
- **Learning and support** which is available from NDC and Salford CVS (see section 3)
- Other **external capacity** - volunteers, students, etc
- Make **links with other local services** - such as the Social Media Centre's community reporters
- Use **information and intelligence which is held by the NDC team** - such as MORI household survey statistics, evaluation reports and national statistics for the area
- Look at **other local statistics** - for example the Office of National Statistics website
- **Join up with other local groups or organisations** who might also be doing evaluation work - are there common themes or information needs. For example, could you do community consultation together?

## STEP 3: Prepare a plan

Use the following checklist to start preparing a plan for evaluating your project or programme:

<b>EVALUATION PLAN</b>				
<b>Issue</b>	<b>How important is this for your evaluation?</b>	<b>How could you cover this in your evaluation?</b>	<b>What do you do already to measure this?</b>	<b>What new things would you need to do to measure this?</b>
<i>Outcome</i>				
<i>Local Area Agreement (LAA targets)</i>				
<i>Community benefit / opinion</i>				
<i>Value for money / economic return</i>				
<i>Efficiency and effectiveness</i>				
<i>Evidence of partnership working</i>				
<i>Innovation</i>				

<i>Transferability</i>				
<i>Risk Management</i>				
<i>Key selling points</i>				

Now you can use the NDC Evaluation Plan template contained in **Appendix 1**, to prepare the evaluation plan for your project.

#### **STEP 4: Resources**

Besides a good plan, you will need the following things for your evaluation:

- **Leadership** - someone to set the deadlines, agree the plan and make sure that the evaluation happens
- **Time** - staff time, time to consult with clients and other stakeholders, time to prepare and write the report
- **Money** - depending upon what you do, you might need a budget for evaluation, to cover materials, printing costs, room hire for feedback events, etc
- **Knowledge** - this toolkit is intended to help, but you might think about further training for staff, sharing practice and knowledge with others, researching how others do evaluation etc (see section 3 for more ideas)
- **Buy-in** - from partners, staff, participants, clients, etc

#### **STEP 5: Start collecting your evidence....**

Here are some suggested tools for use with community beneficiaries:

- Tops and pants - ask participants to write on prepared 'tops' the good things about an activity, and on the 'pants' the bad things
- Graffiti walls and storyboards - use to collect the information as people experience the activities / services
- Mind maps - a good way of building up feedback and linking it together
- Web based tools – logbooks, blogs and webchats
- Photo diaries and scrapbooks
- Observation diaries - to capture changes in behaviour or attitude



## SECTION 2: WHAT EVIDENCE MIGHT A FUNDER BE LOOKING FOR

A commissioner will have a framework for appraising and assessing any bids or tenders, and will be looking for a number of things, including:

- **Clear definition of outcome / benefit** - make sure that you use your evaluation to clearly state the outcome(s) of your work and how this could be measured. Keep measurements / indicators simple, measurable and understandable.
- **A robust evidence base** - use research into the need for your work, and the evidence from evaluation about continuing need following any pilot interventions. Also include reference to any other activities which are going on in the same area, which might also be tackling the need - to explain why your project is still needed or offers something innovative or specifically tailored to the area.
- **Effective capacity and resources** - show in your evaluation how you have the right resources to deliver the project / service. This could include comments on effectiveness and management efficiency.
- **Operational planning and management** - use your evaluation to show how good is your project management and planning
- **Communication techniques** - again, use evaluation to describe how the various partners in a project or service communicate with each other, and how effective the systems are for doing this.
- **Risk management** - commissioners will be looking to find out how you will assess the risks to successful delivery of your project, how severe or likely that these risk are to happen, and how you will manage them. In your evaluation, you could report on how you have managed risks to project delivery in the past.
- **Performance Management Systems** - good evaluation can be part of a good performance management system - use evidence from your New Deal project to show how you are familiar with the requirements of a comprehensive monitoring system, and how you use the information gathered from this to improve your performance. Ensure that you have effective feedback and review mechanisms.

- **Leadership and responsibility** - commissioners will want to see strong leadership at all levels, particularly in terms of making sure that the project meets its targets.
- **Value for money** - does your project mean that there could be savings made elsewhere? For example, will the costs of prescriptions be reduced, GP consultancy attendances reduced, savings made on benefits? Furthermore, could there be other benefits from investment in your service / project in terms of match funding brought in or added value. Measuring the return gained from social or environmental benefits, but in economic terms, can show a potential commissioner what extra benefit he could be getting from investing / contracting with you.

## SECTION 3: TOOLS AND SUPPORT AVAILABLE

### Resources:

- 'Your project and his Outcomes' - Charities Evaluation Services / Big Lottery
- 'Prove and Improve Toolkit' - new economics foundation
- 'Evaluation Resource Pack' - Paul Hamlyn Foundation

### Websites:

OFFICE OF NATIONAL STATISTICS - <http://www.neighbourhood.statistics.gov.uk/dissemination/>

NEW ECONOMICS FOUNDATION PROVE AND IMPROVE - <http://www.proveandimprove.org/new/>

NEW ECONOMICS FOUNDATION MEASURING WHAT MATTERS - [http://www.neweconomics.org/gen/new\\_ways\\_top.aspx](http://www.neweconomics.org/gen/new_ways_top.aspx)

CHARITIES EVALUATION SERVICES OUTCOMES - <http://www.outcomesonline.org.uk/>

NATIONAL PERFORMANCE PROGRAMME - <http://www.ces-vol.org.uk/index.cfm?pg=355>

SOCIAL AUDIT NETWORK - <http://www.socialauditnetwork.org.uk/>

PAUL HAMLYN FOUNDATION - <http://www.phf.org.uk/news.asp?id=172>

## Tools to use:

### PQASSO

[PQASSO](#), the Practical Quality Assurance System for Small Organisations, is the most widely used quality assurance system within the voluntary and community sector, and has been adopted by thousands of organisations wishing to become more efficient and effective. PQASSO uses a self-assessment approach which involves people within an organisation making judgements about its performance against the PQASSO standards.

The PQASSO Quality Mark is a 'kitemark' to show that your organisation has met the PQASSO standards. It is designed to build on your self-assessment by having an independent external review. Achieving the PQASSO Quality Mark means that you have been externally accredited against the PQASSO standards and you will receive the PQASSO Quality Mark logo and certificate to help you to promote and celebrate your achievement. The PQASSO Quality Mark is valid for 3 years.

#### **The benefits of using PQASSO®**

Research has shown that organisations using PQASSO as a self-assessment tool can gain the following benefits:

- more effective and more efficient organisational systems and procedures
- better quality of services for users
- better communication among staff, trustees and volunteers
- more creative thinking, enabling new perspectives and ways of working continuous improvement over time.

#### **The benefits of the PQASSO Quality Mark**

Achieving the PQASSO Quality Mark will give your organisation the following additional benefits:

- external verification of your achievement of the PQASSO standards
- greater recognition and credibility from statutory and independent funders, users and other stakeholders
- increased motivation for staff, trustees and volunteers
- confirmation that your organisation has reached a recognised quality standard
- enhanced organisational learning through the assessment process
- Charity Commission endorsement for Level 2 and Level 3 (PQASSO 3rd edition only).

The PQASSO Quality Mark is an optional 'add on' to support quality improvements within your organisation. If preferred, PQASSO can still be used purely as a self-assessment tool without external accreditation.

For more information on PQASSO, go to: <http://www.ces-vol.org.uk/index.cfm?pg=328>

## Social Accounting and Audit

**Social Accounting and Audit** can revolutionise the way you work and manage your organisation!

Social Accounting and Audit is a process to create a flexible framework which enables your organisation...

...to account fully for its **social, environmental and economic** impact

...to report on its performance and

...to provide the information essential for planning future action and improving performance.

Through this process you will understand the impact your organisation has on the surrounding community and on the beneficiaries.

At the same time you will be able to build in accountability by engaging with your organisation's key stakeholders.

The main benefits to your organisation are you will be able to **prove** the value of your organisation and **improve** its performance!

For more information go to <http://www.socialauditnetwork.org.uk/what%202.htm>

## Social Return on Investment

Social Return on Investment (SROI) is an innovative approach to measurement and value that can be used across the public, private and third sectors. Developed from cost-benefit analysis and social accounting, SROI uses economic valuation to make visible a far greater range of social, environmental and economic costs and benefits than conventional analyses. In so doing, it provides a fuller picture of the value that is being created or destroyed and enables more informed decision-making about how resources are allocated.

For more information go to: [http://www.neweconomics.org/gen/newways\\_socialreturn.aspx](http://www.neweconomics.org/gen/newways_socialreturn.aspx)

## Where to get help

Within the New Deal team, contact Anne Lythgoe (0161 607 8518) [anne.lythgoe@salford.gov.uk](mailto:anne.lythgoe@salford.gov.uk) or Danielle Hough (0161 607 8515) [Danielle.hough@salford.gov.uk](mailto:Danielle.hough@salford.gov.uk)

Also contact Salford CVS Sarah Bawden - Development Worker Quality Counts, Email: [sarah.bawden@salfordcvs.co.uk](mailto:sarah.bawden@salfordcvs.co.uk)  
Tel: 0161 787 7795. or [website http://www.salfordcvs.co.uk/index.asp?ID=274](http://www.salfordcvs.co.uk/index.asp?ID=274)



## **Appendices:**

**APPENDIX 1: NDC Evaluation Plan Template**

**APPENDIX 2: The Salford Agreement**

**APPENDIX 3: What is evaluation?**

**APPENDIX 4: Project Evaluation Report Template**



## APPENDIX 1: NDC Evaluation Plan Template

This template has been developed as a guide for the minimum standard of evaluation plan which is now expected to be prepared by all projects seeking new or further funding from the NDC Partnership. Please complete this and submit with your project appraisal form, or alternatively, where an evaluation plan or brief has already been developed, please submit that instead.

In order to assist you, we have also prepared a short help sheet 'What is evaluation', and a 'Project Evaluation Report Template' which will help you write up your evaluation.

		YOUR EVALUATION PLAN
<b>Evaluation Scope</b>	<p><b><i>What are the aims of your evaluation, what will it cover and what will you hope to get from the evaluation?</i></b></p> <p><i>Including scope of the evaluation in terms of impact, delivering objectives, assessing effectiveness or efficiency.</i></p>	
<b>Indicators</b>	<p><b><i>How will you know?</i></b></p> <p><i>List the indicators or information, both quantitative and qualitative, which will be used to evaluate the above</i></p>	
<b>Baseline</b>	<p><b><i>What is the situation prior to any activity?</i></b></p> <p><i>Tell us about the availability of information about what the situation was like before the project started. List the information which you will be using as a baseline.</i></p>	

<b>Source of information</b>	<p><b><i>From where can this data be obtained?</i></b>  <i>List the sources of both quantitative and qualitative data, including people's opinions and evidence of the impact that your project will have on people's lives</i></p>	
<b>Collection method</b>	<p><b><i>How will the data be gathered?</i></b>  <i>Tell us how the information listed above will be gathered. Distinguish between that data which will be collected by or during the project, and that which is externally available.</i></p>	
<b>Schedule</b>	<p><b><i>When, where and who will gather the data?</i></b>  <i>Provide an outline action plan for preparing the evaluation report, including when the report will be submitted to NDC, who will be involved in collecting data, preparing and presenting the report.</i></p>	
<b>Feasibility Assessment</b>	<p><b><i>How realistic are these evaluation proposals?</i></b>  <i>Tell us about the risks associated with delivering this evaluation plan, any barriers which might appear or issues which might restrict its completion. Also tell us how you intend to manage these risks or issues.</i></p>	

## APPENDIX 2: The Salford Agreement

The Charlestown and Lower Kersal NDC programme must also fit within what is happening across the City of Salford. Effectively it operates on top of or in addition to the normal services provided in the area. It also works alongside other services which aim to target specific issues or areas of need in Salford. These latter services are now outlined in the form of a local area agreement (LAA). Local Area Agreements are three-year written agreements between a local authority area and central Government, which are intended to make people's lives better and improve services. They contain priorities and targets agreed between all the main public sector agencies working in the area and Government.

The LAA for Salford fits within its community plan, '**Making the Vision Real 2006-2016**', which was published in December 2005 and sets out a shared vision adopted by Salford Strategic Partnership (SSP):

*'In 2016, Salford will be a beautiful and welcoming city, driven by energetic and engaged communities of highly skilled, healthy and motivated citizens, who have built a diverse and prosperous culture and economy which encourages and recognises the contribution of everyone, for everyone.'*

23 priority issues for the city have been chosen as the centre of the LAA. These include concerns like the levels of worklessness and anti-social behaviour, and opportunities such as MediaCityUK. It is hoped that success in issues like these will make a major difference to people's lives.

The chosen priorities for 2008-2011 are:

- Reducing smoking **(H8)**
- Reducing obesity **(H9)**
- Reducing alcohol and drug misuse **(H6)**
- Reducing teenage pregnancy
- Improving parenting **(H7)**
- Raising educational attainment **(CY6, CY7)**
- Increasing basic skills **(BES4)**
- Improving access to higher education **(CY9)**
- Reducing child poverty
- Reducing worklessness **(BES1)**
- Maximising quality of life for older people **(BC2)**
- Reducing numbers of looked after children
- Maximising access to affordable, decent homes **(PE1, PE2)**
- Increasing environmental attractiveness **(PE3)**
- Increasing community engagement and empowerment **(BC1, BC2)**

- Reducing the fear of crime **(C1)**
- Reducing anti-social behaviour **(C7)**
- Safeguarding vulnerable adults
- Addressing climate change
- Developing MediaCityUK
- Increasing community cohesion **(BC2)**
- Growing and developing business and enterprise **(BES10)**
- Improving transport connectivity to services **(PE4)**

**(the references in brackets are the most relevant NDC outcome)**

### **Performance management for the LAA**

In the same way that the NDC programme has selected a number of indicators to measure progress towards its outcomes, Salford's Strategic Partnership have agreed 35 performance indicators from the government's National Indicator Set to go into the LAA. It will be these 35 indicators by which Government will measure Salford's progress. 33 other supporting indicators have been added at a local level and are just as critical as the designated ones, but will only be monitored locally. The agreement also contains 16 statutory early years and education indicators.

Targets for each indicator for the three-year duration of the agreement have been negotiated and local partners have signed up to achieving these targets.

Those issues which have been identified as a priority within the Charlestown and Lower Kersal NDC area are not necessarily the same as those which have been identified at a Salford wide level in the Salford Agreement - but many are.

However, if regeneration projects are to receive investment from Area Based Grant or other Salford wide funding sources in the future, they must demonstrate that they are contributing towards improvements in one or more of the LAA priority areas. It will be very important for projects which are currently funded by the New Deal programme to demonstrate delivery of LAA indicators, if they are to receive funding in the future from the SSP.

Furthermore, government is seeking alignment of NDC and LAA funding, outcome priorities and targets.

For more information, visit the Partners in Salford website <http://www.partnersinsalford.org/>

## **APPENDIX 3: What is evaluation?**

Evaluation is that part of a project where you stand back and take stock. It is where you:

- monitor what you are doing
- measure what you have done
- find out what was effective and what was not
- report on your achievements in terms of delivering what you set out to do

It is not an add-on feature of but a necessary part of all projects.

Evaluation is at its best when it is fully integrated into all project stages.

It is there to help you:

- learn from your mistakes
- pass on the benefits of your experience to others
- account for the money and resources you have used
- plan for the future of your project
- obtain information for future tenders and funding bids

### ***WHEN TO PLAN THE EVALUATION***

It is best to plan the evaluation at the same time as the project itself is being planned—right at the start.

This allows you to decide when the project will need feedback on how it is going and whether it will have money to make any changes necessary.

If you are managing a project that does not have an evaluation scheduled in the project plan, review what sort of information people might need during the remainder of the project's lifetime, and beyond.

Even if it is too late to make changes to your own project, it is still valuable to evaluate ongoing or completed projects. Evaluation will tell stakeholders in the project how successful the project was and provide valuable information to other people planning project succession proposals, tenders / funding bids and commissioning activities.

### ***WHAT AN EVALUATION SHOULD COVER***

Practically, evaluation is about asking the right questions at the right time. These questions can be broken down into the following areas:

**Process or interactive evaluation** examines the project's implementation and whether it was delivered in the way it was intended. Typical questions are:

- was the project implemented as planned?
- what led to any variations of the implementation plan?
- what does the project need to do in response to any changes?
- how significant are the changes in delivery (incremental or transformational)?

This can occur at any point of the project.

**Evaluation for management or monitoring evaluation** focuses on how adequate the project's management, planning and finance procedures are and how they might be improved. Typical questions include:

- was the project cost effective?
- would the same or better outcome have been delivered with fewer resources?
- was the project delivered on time and within budgeted costs?
- what are the key lessons for the delivery of the project and what has been done to disseminate them?
- how did the partnership operate?
- At what stage were objectives agreed?
- was there conflict? how was consensus reached?
- what decision-making and steering mechanisms were employed?
- who held accountability for delivery? was this shared?
- how significant was the change in delivery (incremental or transformational)?
- how was progress monitored against: a) delivery milestones; b) target outcomes?

- if the project involved the private sector, what techniques were used to ensure that suppliers delivered on time and to the required quality?
- if you were doing it again, what would you do differently?

**Impact evaluation** is to find out what effect the project had. Typical questions are:

- how was the project implemented?
- were there any changes in levels of problem being addressed?
- were there any unexpected effects?
- how effective was the project in achieving its objectives?
- how much of the outcome can be attributed to the project and how much to other factors (e.g. underlying trends or wider initiatives that complemented the project)?
- what would have happened under the do-nothing option?
- does the project need to be modified?
- does the project remove a significant proportion of the cost of delivery?
- does it remove duplication/ make best use of IT/ realise economies of scale?
- does the project promote efficiency? Better still, has it released cash or resources for the partners?

**Sustainability evaluation** is to find out if the project will continue / be mainstreamed, Typical questions are:

- have risks and barriers been identified for taking the project forward?
- have opportunities for joining up with other departments been fully considered?
- have opportunities for leveraging existing infrastructure been considered?
- is project 'future proofed'?
- could the project be copied by other organisations?
- would the benefits be different in those organisations?
- is there a central coordination body/ department?
- what leverage do they have? are they in a position to mandate/ encourage/ market/ facilitate wider adoption?
- have they been involved in the project through out its lifetime?
- does this fit into a key delivery area for that body/ department?
- what are the indications that the central body will exert leverage?

It should be noted that these types of evaluation are NOT mutually exclusive, and elements of any and all of the above could be built into the evaluation of your project.

### **THE STAGES IN AN EVALUATION**

- 1 setting up a timetable and budget for the evaluation
- 2 managing stakeholders throughout the evaluation
- 3 scoping the evaluation
- 4 planning for action once the findings from the evaluation are released
- 5 selecting an evaluator (if required)
- 6 managing the evaluation
- 7 acting on the findings and recommendations

## APPENDIX 4: Project Evaluation Report Template

The following could be used to prepare an evaluation report for either a project or a piece of work which has been done as part of a project. Effectively it seeks to report the answers to a series of questions about the work:

1	<b>What did the work / project set out to do?</b> (list aims and objectives if these exist)
2	<b>Who was involved in the work / project?</b> Include both people who did the work, and those who benefited from it.
3	For each area of work (or objective), <b>what evidence do we have that this has been achieved?</b> Include both statistical evidence and feedback from other people involved in the project Check to make sure that you have some evidence from those involved in both delivery and who benefited from the work / project.
4	For each area of work (or objective), answer the following questions: <ul style="list-style-type: none"><li>• <b>What things did you do to achieve this piece of work / objective?</b></li><li>• <b>What worked, and why?</b></li><li>• <b>What did not work, and why?</b></li></ul>
5	Overall, <b>what conclusions can you draw:</b> <ul style="list-style-type: none"><li>• About the changes / impact / outcomes which have happened as a result of this work / project?</li><li>• About the way that it was done?</li></ul>
6	<b>What recommendations can you make</b> about how others could do similar work in the future?