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Acknowledgements

About the authors

This pack has been written by Jo Kennedy, Ian McKenzie and Helen Wilson, for Befriending Network Scotland, the Scottish Mentoring Network and Evaluation Support Scotland. All three authors are independent consultants who have extensive experience of both befriending and mentoring work and of monitoring and evaluation practice. Contact details for these organisations can be found on page 116.

Authors' Acknowledgements

This pack could not have been written without the assistance of many people working in the field of befriending, mentoring and evaluation in Scotland. We wish to thank in particular Mike Nicholson, Scott Telfer and Steven Marwick for their practical assistance and support; all those practitioners who attended the content planning days, agreed to be case studies and read the drafts and all the funders, who gave their time to us.

Introduction

This evaluation resource pack was commissioned by Befriending Network Scotland, the Scottish Mentoring Network and Evaluation Support Scotland to support projects to undertake monitoring and evaluation for themselves. It is funded by Laidlaw Youth Project and the Scottish Executive.

Why Has The Pack Been Developed?

This pack has been developed to provide a set of processes and tools that befriending and mentoring organisations can adapt and use to monitor and evaluate their work.

Befriending Network Scotland and the Scottish Mentoring Network had both undertaken research that showed that members were struggling with evaluation.

Evaluation Support Scotland was set up to provide specialist support to voluntary organisations and their funders to enable them to improve the process and outcomes of evaluation.

Research specifically for this pack showed that projects often do more monitoring and evaluating than they think they do, but they might not call it that, and, particularly in small projects, much of it goes on in peoples' heads rather than on paper. Funders are often frustratedly aware that projects have achieved more than they are able to demonstrate.

Organisations often undersell themselves in terms of what they have achieved. They don't collect enough information

Funder

How Was The Pack Developed?

The pack is based on research in the field. Staff from befriending and mentoring projects attended content planning sessions during which they were asked both about their own experience of monitoring and evaluation and about what they would find useful in a resource pack.

In addition, funders of mentoring and befriending projects were interviewed to find out what support they thought projects needed. These funders represented a cross section of small and large trusts and foundations, and statutory funders. They included the Big Lottery Fund, Lloyds TSB Foundation for Scotland, Children in Need and a statutory funder.

Case studies of large and small organisations working in the field were undertaken to find out how projects tackle monitoring and evaluation at present and to share their experience of what works and what doesn't work.

What Is Evaluation, What Is Monitoring?

Evaluation is the process of making a judgement about how successful you have been as a project in making the difference you intended to the people you set out to support.

Monitoring involves gathering evidence on an ongoing basis to ensure that you are doing what you said you would do.

This pack supports you to make your own internal ongoing evaluation, the results of which can be used both to inform

fundere and to improve the project. Some of the advantages of undertaking your own monitoring and evaluation are that you can set your own criteria for success and that you can learn from your mistakes as you go along, rather than when it is too late.

The evaluation process assumes that needs have been identified and the project has been set up in response to these needs. Good monitoring and evaluation processes enable you as a project to demonstrate that you are meeting needs and can contribute to the identification of additional needs, which can lead to project development.

The Challenges Of Monitoring And Evaluation

Befriending and mentoring projects attending the content planning days identified several challenges associated with monitoring and evaluation:

- monitoring and evaluating takes time and that time needs to be accounted for in project planning
- the process can feel like yet another burden in an already overworked voluntary sector
- evaluating means asking questions of befriendees / mentees which might be considered intrusive (this is a particular concern at the beginning of the relationship)
- measuring 'soft outcomes' like changes in self-esteem or confidence is very difficult
- success is different for each individual – how do you measure it across a whole project?
- once people have disengaged from a project its often difficult to get them to share their experience for the purpose of evaluation

The Benefits Of Monitoring And Evaluation

... but they were also aware of the benefits:

- it helps people learn about what works and what doesn't work from their own experience
- it helps people to recognise and celebrate success
- it gives projects solid evidence to use as a basis for improving practice
- it supports forward planning
- it demonstrates both to funders and others involved in the project how effectively resources are being used.
- it keeps people focused on the ultimate purpose of the project.

How To Use The Pack

This pack aims to provide an outline of the evaluation process and some useful materials for projects undertaking evaluation. It attempts to provide solutions to some of the challenges and to show how projects can benefit in practice from evaluation.

The pack follows the structure of an evaluation process. It can be read through from beginning to end but also dipped in and out of depending on what stage of the process you are at. Evaluation is not linear. We have defined it as having 5 stages, which are revisited over the lifetime of the project.

Section 1 defines the difference you are trying to make.

Section 2 looks at how you will know when a difference has been made, what kind of evidence you need to look for and how you define a baseline.

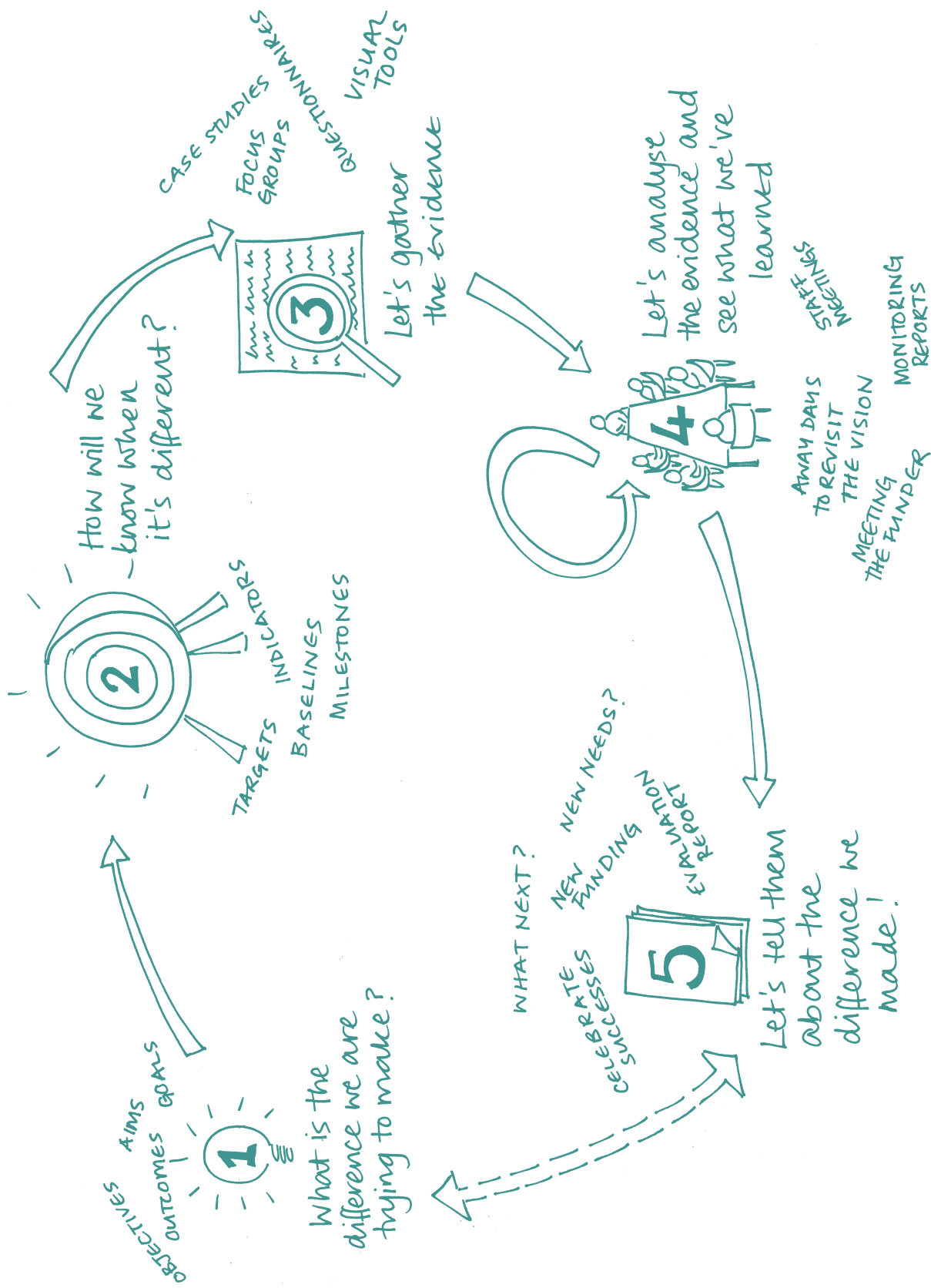
Section 3 looks at different ways of gathering evidence.

Section 4 looks at how you analyse evidence and learn from evaluation.

Section 5 examines how to compile monitoring and evaluation reports.

Each section includes views from funders, case study examples, useful resources, practical tips and summaries in the form of tough questions to answer. We have included tools and frameworks, some previously published and others which have been developed by projects themselves. All can be adapted for your own purposes. The pack finishes with a glossary and a final section on references and further resources.

Evaluation Cycle



What is the difference you are trying to make?



This section examines:

- developing a vision
- becoming clear about what you are trying to achieve
- describing the difference between outcomes and outputs

The quality of our evaluation depends upon us being absolutely clear about what we are trying to achieve.

Successful organisations are characterised by their well articulated and shared sense of vision. This vision is what binds people together and ensures that everyone is working to the same ends. A clear vision acts as an inspiration to everyone who is part of the project and an incentive to funders, partners and potential users of the service to get involved.

Developing A Vision

Who needs to be involved?

Sometimes a project is the brainchild of one person, who, once they have some funding, recruits others to their vision.

Never doubt that a small group of thoughtful committed citizens can change the world: indeed it's the only thing that ever does.

Margaret Mead

Vision: what the world would look like if the project is successful. You could describe the results of this process as *mission* or *purpose*.

Involving befrienders on an advisory group has been a very positive experience for us for developing a future vision.

Project Manager

At other times it is the result of a group of people developing a vision together. Project workers are often very clear about the vision, but it can be useful to call a meeting of 'stakeholders' to ensure that everyone is 'singing from the same hymn sheet' and that any controversial issues are discussed. Stakeholders are all those who can claim a legitimate interest in the organisation and its work. They could include members of the board, members of staff, staff from partner agencies, community members, potential or existing funders, service users and volunteers. These meetings are often very useful at the beginning of a project but can take place at any time as a way of revisiting what it is you are really trying to achieve.

BOPS

Breaks and Opportunities for People (BOPS), a befriending and short breaks service, used a planning day to review service provision and create a vision for the future of the service.

A range of stakeholders were involved in the day and external consultants were invited to facilitate the process and record it graphically.

At the beginning of the process, the team were invited to tell the story of the service, which was useful as a starting point so that everyone understood the history, background and prevailing values of the project. All the stakeholders also shared their personal and professional journeys with the project, which helped to create mutual understanding.

The planning day included:

- Creating a vision for the future of the service
- Setting goals which could be achieved within the next year

- Thinking about what would need to change in order for that to happen
- Thinking about who needed to help to make it happen
- Identifying first steps towards the one-year goals and set timescales around these

During the whole process, the project staff were able to identify shortfalls in the current service and areas for development. The day acted as a springboard for the project and it enabled them to take stock, and ultimately to begin to change the service from a fairly traditional model to a more innovative befriending service.

Clarifying the vision can be achieved through a wide-ranging discussion stimulated by questions such as:

- What are we really trying to change?
- What is befriending / mentoring really about?
- What do young people / people with learning disabilities / people with mental health problems / homeless people / older people in this area really need?
- How will peoples' lives be affected?
- What would it be like in ten years time if our project was working really well, what would have happened?
- What would our ideal future look like?
- What impact do we want to make on our local community?

It is important to keep the initial discussion as broad and creative as possible, putting aside any potential limitations. Outlining ideas up on a wallchart and using graphics can help to do this.

A vision created in this way enables a range of different perspectives to be heard and encourages those present to commit to making it a reality. There is an obvious advantage to involving funders in this kind of process – they will be pleased to be invited along, though in practice they may find it difficult to attend.

Becoming Clearer About What You Are Trying to Achieve

Outcomes: changes which describe the the impact of the project on those it sets out to benefit. You could call the results of this process aims, objectives, key results, goals or impact.

Once the vision has been agreed, you need to break it down into a set of desired outcomes that capture the difference the project is trying to make. They define what a project wants to change and also provide a focus for measuring how much it has achieved.

The outcomes have several uses, for example, they

- enable you to communicate to others what the project is trying to achieve
- form the basis of the work plan
- define the criteria against which the project is evaluated

The desired outcomes need to be clear, measurable, distinct and time limited, as well as being achievable. They should always reflect changes happening in the lives of befriendees or mentees such as increased skills or confidence, a wider social network or taking up new opportunities for learning or employment.

In some projects the desired outcomes also reflect changes for befrienders/mentors. These are only relevant when the project specifically sets out to make a difference to the lives of befriendees / mentors, as well as to befriendees / mentees, for example in a peer mentoring project or where the project is funded to promote volunteering.

In many cases improving the lives of befrienders/mentors does not form part of the core purpose of the project. This does not mean that projects do not need to support befrienders / mentors. They do, in order to keep them and to recruit more. This aspect of the work will need to be monitored, so that the project can learn about what works and what doesn't work in supporting volunteers, but in most projects it should not form part of the ultimate evaluation.

Projects may also want to demonstrate that the project itself has changed on the basis of what they have learnt. So there could be a statement reflecting project change in addition to changes in the lives of service users and volunteers as in the Outcome 5 of the Bridging the Gap case study (see overleaf).

It may be that the project has one very clear outcome like supporting young people to get a job. It may be that it has several but a project with more than six statements of what it is trying to achieve is falling into the trap of wanting to change the world rather than a small part of it.

re:discover, a mental health befriending project based in Edinburgh, has identified several 'key results'. These include:

- service users have a widened social network
- service users continue to attend or take part in activities they took up with their volunteer

Bridging the Gap

Bridging the Gap in Dundee provides a befriending service to people who hear voices. It has been funded by the Big Lottery for three years and was looking to set up evaluation processes at an early stage.

The project worker had been instrumental in gaining funding for the project and was able to articulate the vision very clearly. She found identifying the project as 2 on the befriending / mentoring spectrum (see pages 24–25) very useful in defining exactly what it was setting out to achieve. She went on to develop a series of statements about what the project will have achieved over the next three years.

These were amended and agreed with the management committee and submitted to the funder as the criteria which the project will use for evaluation. In practice they differed little from the information set out in the funding application, but they had been clarified and simplified for the purposes of the evaluation.

Outcome 1:

Voice hearers are less isolated

Outcome 2:

Voice hearers have explored new opportunities for personal development in the community

Outcome 3:

Voice hearers have more acceptance of their condition and are able to access support more effectively

Outcome 4:

Befrienders have gained skills and experience in mental health issues

Outcome 5:

Bridging the Gap has continued to learn and develop on the basis of feedback from befrienders and befriendees

The Difference Between Outcomes and Outputs

Outcome statements should always clearly reflect the difference the project is trying to make rather than how it intends to go about making that difference. So, for instance, widening a person's social network is an outcome, whereas recruiting ten volunteers to work for the project is not.

This reflects the distinction between Outcomes and Outputs.

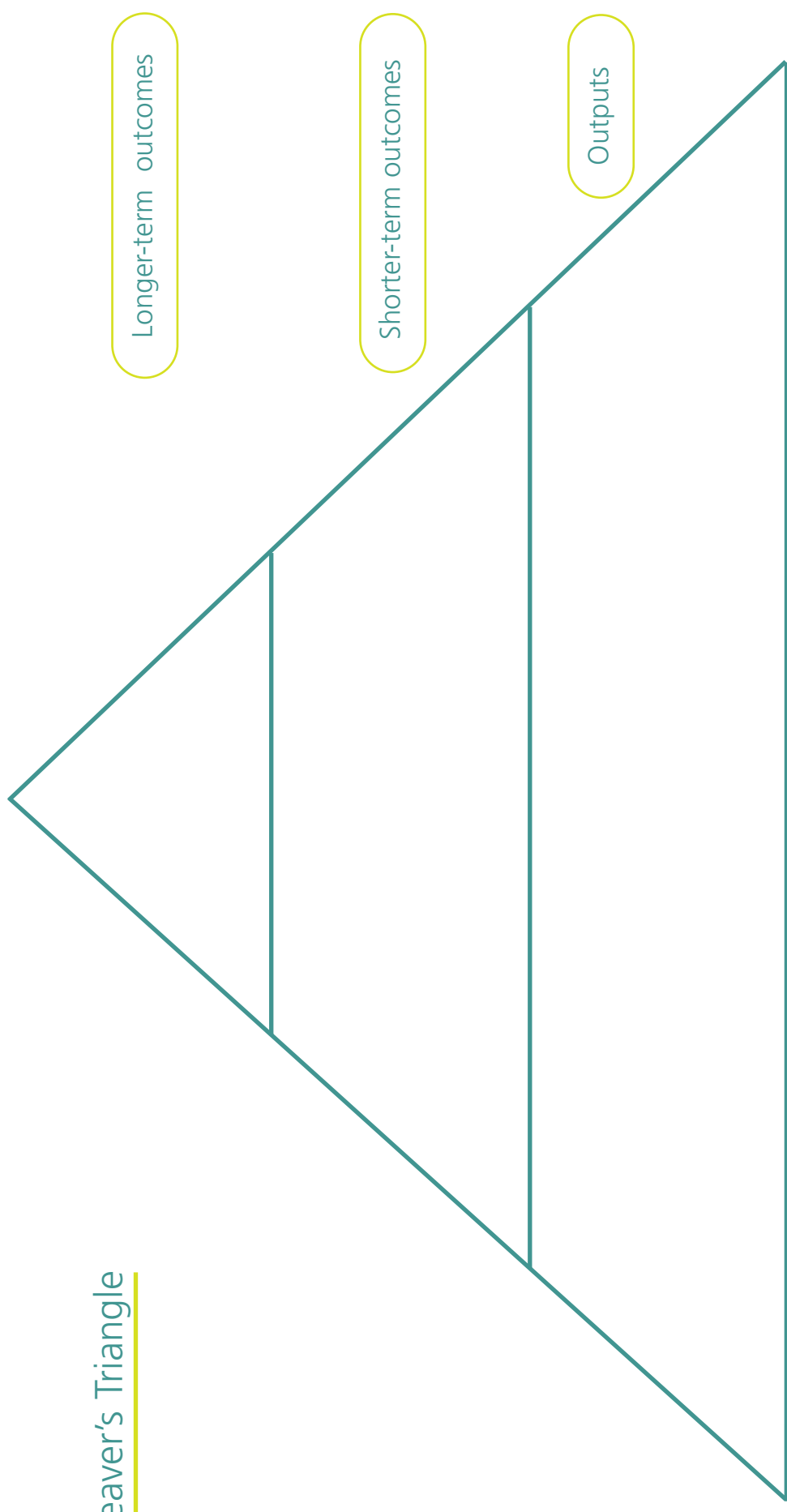
Outcomes are the changes your project makes to the lives of people it works with. They tend to start with words that indicate a change or difference e.g. increase, reduce, widen, expand, enable, improve, sustain.

Outputs are the things you do to achieve your outcomes. They tend to start with words that indicate activity e.g. recruit, provide, offer, set up, distribute, produce, organise.

Project evaluation relates mostly to outcomes, whereas monitoring relates mainly to outputs. Monitoring is crucial, because if the activities don't happen in the way planned, the desired change is unlikely to take place.

The Weaver's Triangle shown overleaf helps make the distinction between short and long-term outcomes and outputs. In practice, project evaluation will focus on short-term outcomes, like getting a job or widening a social network; long term outcomes, like a reduction in re-offending rates or lasting improvement in mental health, are worth mentioning but may be hard for a project to measure.

Weaver's Triangle

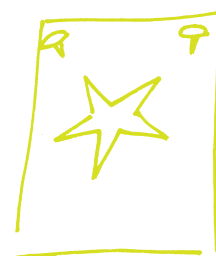


For more information on Weaver's Triangle go to www.healthcomms.org/pdf/weavers.pdf

What Do Funders Want?

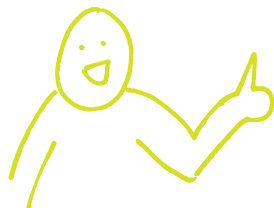
Funders want clarity on the outcomes the project is setting out to achieve. In practice, defining the vision and setting outcomes often happen as part of the process of applying for funding. Staff coming into post often find that outcomes put forward in the funding application turn out to be impractical and need to be changed. These changes should be negotiated and agreed with funders as soon as possible.

It is commonly thought that most funders are only interested in what have been termed 'hard outcomes'. These are normally numbers, perhaps the number of young people who have got a job, or a reduction in admission rates to psychiatric hospital for people with mental health problems. Research with funders undertaken as part of the development of this pack demonstrated that they are equally interested in soft outcomes i.e. behavioural or attitudinal changes in people.



We fund work in a range of charities with different client groups so will be looking for both hard (moving into employment) and soft outcomes (growing in confidence).
(Funder)

Befrienders Highland sets outcomes that incorporate the needs of funders e.g. for one they track 'the number of matches at any given time', for another they record two service user outcomes (reduction in isolation and increase in confidence in social situations) and one outcome for volunteers (to promote new volunteering opportunities for people in rural isolated locations or who are housebound).

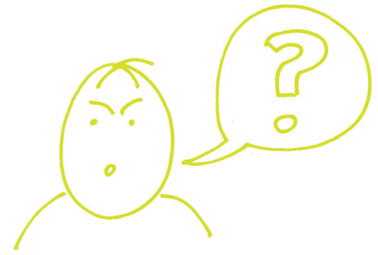


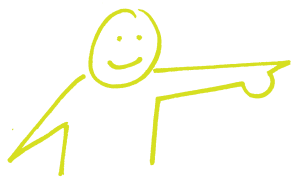
Practical Tips

- use the opportunity of a visioning session to get people you want involved and signed up – particularly funders and community members, or to renew commitment to the project
- use the SMARTER – Specific, Measurable, Agreed, Realistic, Time-bound, Exciting (stretching and challenging) Recorded (and Rewarded) – criteria, when defining your outcomes
- don't try to be too ambitious – more than 6 outcomes is probably too many, 2 or 3 are fine
- keep it simple – don't include more than one outcome in a sentence

Tough Questions

- Do our stakeholders share the same vision for the project?
- Who does the project seek to benefit?
- Are our outcomes clear and measurable?
- Do our outcomes reflect changes in the lives of service users rather than activities we intend to undertake?
- Have we kept our funders involved and informed?





Useful Resources

Supporting Community Participation: The Role and Impact of Befriending, by Jo Dean and Robina Goodlad (Pavilion, 1998) is useful for befriending organisations in clarifying their purpose.

The Big Picture: a framework for quality improvement in voluntary organisations (SCVO, 1999) has a good section on Direction.

Partners in Evaluation (www.pievaluation.co.uk), a training and consultancy agency, runs a helpful workshop on outcomes and outputs, and provides handouts, from which we took some of the definitions in this section.

Evaluation Support Scotland (ESS) publishes a series of support guides on evaluation. Particularly relevant is Support Guide 1: Clarifying your aims, outcomes and activities, available at:

www.evaluationsupportscotland.org.uk

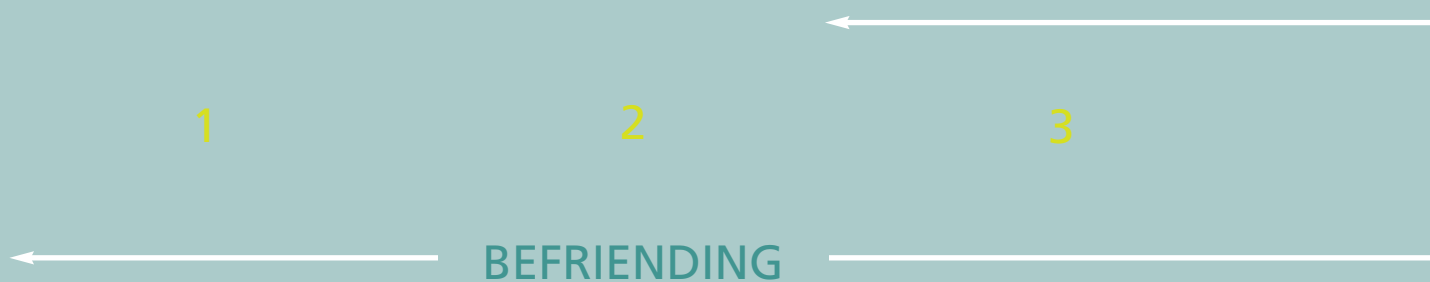
The Continuum model

The BNS Befriending / Mentoring Spectrum is based on the nature of the objectives of a supportive relationship, and on the importance given to achieving those objectives through the relationship. There are six broad types on this spectrum illustrated and described overleaf:

Experience shows that although a project may aim to provide relationships relating to one of the categories overleaf, there can be variation between relationships at the same project. Projects may opt to develop a particular category of support, believing it to be more appropriate for their client group, but there will still be variations for individuals within that group.

Experience also shows that projects providing volunteer support for people who are particularly isolated or disadvantaged typically provide support relating to types 1–3. This range allows for informal relationship building where this is absent from someone's life, or at most more objective-based relationships which retain an element of social support.

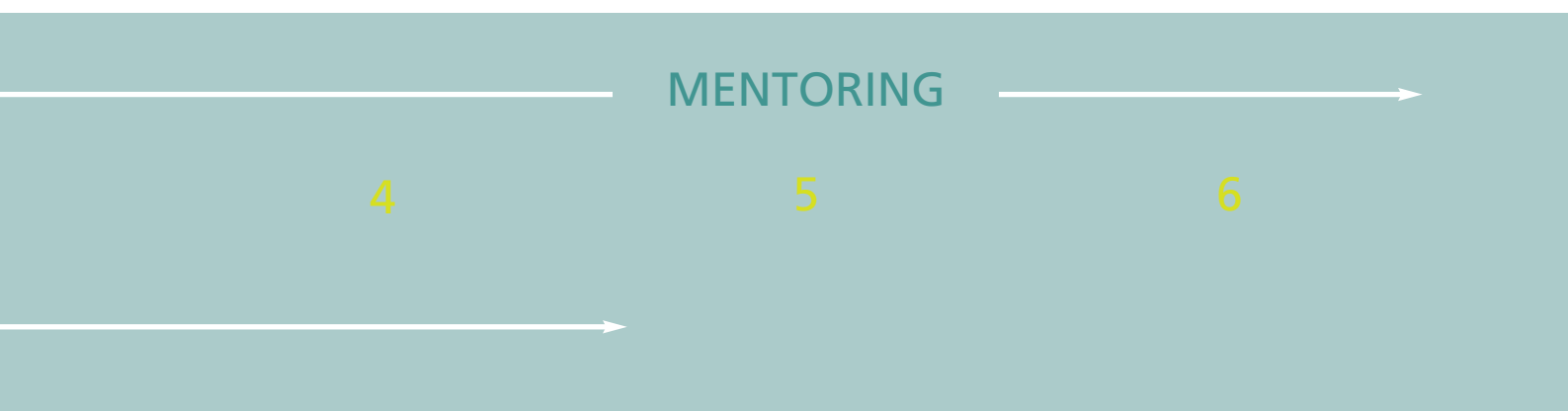
Relationship types 5 and 6 are potentially more suitable for people who have reached a certain level of stability in their lives and who are able to make a commitment to an ongoing relationship that will focus on their personal development (see SMN model on p.27). It may well be that befriendees / mentees whose lives are currently very disrupted will be less likely to fit with this style of support, whereas befriendees / mentees who are resettled and have achieved greater stability may be open to focusing on further positive change.



1. Befriending – the role of the volunteer is to provide informal social support. The primary objective of the relationship is to form a trusting relationship over time usually in order to reduce isolation and to provide a relationship where none currently exists. Other outcomes may occur e.g. a growth in confidence, but these are never set as objectives for the relationship.

2. Befriending – the role of the volunteer is to provide informal social support. There may be additional stated objectives at the start of the relationship e.g. increasing involvement in community activities. The success of the relationship is not dependent on these objectives being achieved, but they are seen as a potential benefit of befriending over time.

3. Befriending / Mentoring – the role of the volunteer is to provide informal social support and through this supportive relationship to go on to achieve stated objectives e.g. increasing befriender / mentee's confidence to enable them to do activities independently in the future. The objectives do form a basis of discussion between project, volunteer and befriender / mentee at an early stage, and are reviewed over time.



4. Mentoring / Befriending – the role of the volunteer is to develop objectives with the befriender / mentee over time. Initially the role is to develop a relationship through social activities in order to establish a level of trust on which objective setting can be based. Due to the befriender / mentee's changing circumstances, objectives may take time to set, and may be low key.

5. Mentoring – the role of the volunteer is to work with the befriender / mentee to meet objectives which are agreed at the start of the relationship. These are achieved through the development of a trusting relationship which involves social elements but which retains a focus on the objectives agreed at the start.

6. Mentoring – the role of the volunteer is to work with the befriender / mentee solely on agreed objectives which are clearly stated at the start. Each meeting focuses primarily on achieving the objectives, and the social relationship if achieved is incidental.

Scottish Mentoring Network model

The SMN model is based on a generic service delivery model developed by the partners in Edinburgh's Joined Up for Jobs Strategy and has been adapted to highlight the progress of young people being supported and mentored. It sets the position of mentoring within the overall process from 'crisis' to 'thriving'.

Mentoring (Scottish Mentoring Network)

| | | |
|--|--|--|
| <p>Crisis & acute isolation</p> <ul style="list-style-type: none"> • Offending • Truancing • Bullied • Isolated • Domestic abuse/violence • History of abuse • Mental/emotional health • Drug/alcohol issue • Unemployable • Physical/sexual health | <p>Stability & sustaining basic opportunities</p> <ul style="list-style-type: none"> • Regular benefits • Personal care and management skills • Use of support services • Moving on to independent living • Increased self-awareness • Increased activity/self-esteem • Has aspirations • Coping emotionally | <p>Thriving</p> <ul style="list-style-type: none"> • Careers Guidance • Increased self-esteem and confidence • Assessment of barriers to employment • Ability to make informed choices • New skills and knowledge • Sustaining opportunities • Regular income |
| <p>Example interventions</p> <ul style="list-style-type: none"> • Therapeutic • Support/counselling or raising self-esteem • Basic confidence building • Friendship • Food and shelter • Harm reduction • Health care • Advocacy • Welfare benefits • Anger management | <p>Example interventions</p> <ul style="list-style-type: none"> • Guidance Support (Education) • Continued harm reduction work • Personal and social development including anger management • Career development (hard and soft outcomes) • Basic informal education • Tenancy support | <p>Example interventions</p> <ul style="list-style-type: none"> • Agreements with employers • 1–1 support and on the job mentoring • aftercare guidance and practical support • Intermediate Labour Market • Modern apprenticeship • New Deal Gateway Options |
| BUDDYING & BEFRIENDING | BEFRIENDING MENTORING | MENTORING |

How will you know when you get there?



This section includes:

- Setting indicators
- The difference between quantitative and qualitative information
- Establishing baselines
- Using maps and self-assessment scales

You need evidence to demonstrate that you have made the difference you set out to make. So you need to think ahead about the kind of changes you expect to see that will let you know, or suggest, that you are on the right lines. This is called setting indicators. It is important to start this process as early as you can so that baselines can be established and systems set up to gather and store the evidence. But it is never too late to start.

Baseline: a measurement of the situation of befriendees / mentees before they have a befriender / mentor.

Each outcome needs to be backed up by a clear set of indicators. The best way to do this is to take each outcome individually and work out what evidence would show that it has been achieved. In some cases this is very simple.

Apex Scotland has the clear aim of supporting young people at risk into employment. Its main indicator of success is: the number of clients moving into full or part-time further education, full or part time employment or voluntary work.

Apex Scotland

It also has several indicators to help monitor project activity. These include:

- the number of clients referred to each service per month
- the number of clients starting each service per month
- the number of early leavers for each service per month
- the number of clients with action plans, reviews and exit plans.

The kind of indicators listed above are often called 'quantitative' because they refer to numbers. Information, which relates to changes in attitude, behaviour or feelings is referred to as 'qualitative'. Quantitative and qualitative information is often most effective together. So, if ten mentees went on to get a job (quantitative information), it would be useful to know what they thought were the most successful interventions made by their mentors (qualitative information).

If you are struggling to set indicators, it may be because you know that they will be difficult to measure or you are being over ambitious in what you can achieve from the project.

For instance, if the long-term outcome of your mentoring project is to reduce the rates of young people offending, you may find it difficult to gather that information, and even if you can gather it, it might be hard to link it to the impact of your project. It may be better to focus on shorter-term outcomes for the mentees, like employment, education or an improvement in self-esteem, all of which are measurable and could be linked to your interventions.

You would hope that, ultimately, this would have an impact on young offending rates, but you would not have to prove it to demonstrate the worth of your project.

So the process of setting indicators often helps a project to be realistic about what it is hoping to achieve.

Overleaf is a template linking the difference Bridging the Gap wants to make with the evidence it needs to show success. A blank template is included at the end of this section.

Section 2 : How Will You Know When You Get There?

| What is the difference we want to make? | How will we know when we get there? |
|---|--|
| Voice hearers are less isolated | <ul style="list-style-type: none"> • Voice hearers go out more regularly • Voice hearers go to more places • Voice hearers attend more groups • Voice hearers tell us they feel less isolated |
| Voice hearers explore new opportunities for personal development in the community | Increased number of voice hearers take up a variety of community based opportunities for personal development e.g. Community based adult learning, college courses, employment, volunteering, new business development |
| Voice hearers have more acceptance of their condition and access support more effectively | <ul style="list-style-type: none"> • Voice hearers have joined the self help group and contributed to group meetings • Voice hearers talk about their condition more openly • Voice hearers feel more in control of their support • There is an increase in the number of voice hearers getting involved in training and becoming activists |
| Befrienders gain skills and experience in mental health issues | <ul style="list-style-type: none"> • Befrienders tell us that they have increased their skills • Befrienders demonstrate that they have more understanding of voice hearing (through the use of an assessment tool) • Befrienders attend training courses on mental health, stress, voice hearing and recovery • Befrienders go on to be involved in work or other activities related to mental health |
| Bridging the Gap continues to learn and develop on the basis of feedback from befrienders and befriendees | There will be changes in the project based on feedback from befrienders and befriendees |

Where Are You Starting From?

In order to assess progress, you need to collect some baseline information about the situation for the individual at the point of referral. This information needs to relate to the improvements you are trying to make. So, if you seek to support people into employment, for the purposes of setting a baseline, you merely need to know whether the individual already has a job (obviously you will need to know more to determine what kind of job would be suitable). But if you are trying to raise self-esteem, you will need to make an assessment of an individual's self-esteem at the beginning.

There are several ways to set a baseline: using a scale or map, setting goals, or using referral assessments.

i. Using a scale or a map

Many projects aim to decrease social isolation or increase community participation. Visual maps are useful tools both for plotting social networks and community involvement. Templates for both of these are included at the end of this section. Going through the week with the befriender / mentee, plotting what they do and where they go, can also provide a good way of drawing up a baseline.

Scales are very useful for gathering both quantitative and qualitative information, which can go towards establishing a baseline. re:discover are using the Rosenberg self-esteem scale, which is published on the web and is widely used, to take a baseline on self-esteem.

The Volunteer Centre in Edinburgh is piloting a project mentoring people on incapacity benefit. They are also using a scale, which they developed themselves, to measure progress into work, further education or

If a project doesn't know its starting point how can it say it has achieved anything!

Funder

This usually happens as an open discussion and goes at the befriender's pace. If they are not ready to set goals at the beginning, this might happen at the 3-month review or even later.

Project Manager

volunteering opportunities. Both scales are included at the end of this section.

Bridging the Gap has put together a draft voice hearer initial interview schedule, designed with their particular outcomes in mind. It is included opposite and will be piloted and adapted over the coming months.

Befrienders Highland takes a similar approach with its Friend Review which is included at the end of this section.

Other projects have received training in use of the Rickter Scale as a self-assessment tool (www.rickter.scale.com).

The advantages of these self-assessment scales are that:

- They provide a clear baseline to measure against
- They can be designed to relate to the purposes of the project
- They apply across all befriendees/mentees but can also be used as the basis for setting goals/aspirations for the relationship
- They can be used to analyse effectiveness across the whole project
- Befriendees/mentees often like them because they can see their progress clearly
- Funders often like them because they provide a clear picture of how the whole project is doing

There are also a couple of disadvantages. The first is that they can feel intrusive. Some individuals may not want to speak openly in a first meeting, and most projects spend some time getting to know an individual and their aspirations before finding out in any detail about their current situation, so that a 'deferred' baseline is taken several weeks after referral.

Voice Hearer Interview

1. Voice hearers feel less isolated

Could you draw up a relationship map – plotting all those who you know and see regularly.

How happy are you with what the map shows? 1 very unhappy – 10 very happy

Do you go along to any groups at the moment?

What if anything, would you like to change about this?

2. Voice hearers explore new opportunities for personal development in the community

Could you draw up an activities map including what you do and where you go.

How happy are you with what the map shows? 1 very unhappy or 10 very happy

What if anything, would you like to change about this?

3. Voice hearers have more acceptance of their condition and access support more effectively

Do you talk about your condition with family/friends/professionals?

What support do you get at the moment from services or self- help groups?
How well does your existing support meet your needs?

How in control do you feel of the support you get? 1 out of control–10 in control

The second is that naturally people feel differently on different days and therefore may answer differently depending on when you talk to them. The way they answer the questions will also depend on how much they trust the person asking them. It is important to give the individual a choice about if and how they fill in the scale.

ii. Setting goals for the relationship

It is good practice to ask the befriender / mentee what they want out of the relationship and to record these goals (which could be anything from getting a job to having fun) as a baseline. These goals need to be reviewed regularly as they will change as trust develops in the relationship.

iii. Referral assessment

Almost all projects have some kind of referral form which is filled in with the individual or the carer. Obviously this needs to be done as sensitively as possible.

Information sought should be restricted to what is relevant for evaluating the befriending / mentoring relationship.

It should also be kept confidential. So referral information should include: what the individual is looking for from the befriending/mentoring relationship and what position they are starting from.

It is useful, at the point of referral, to get information on the individual's situation from the referrer, a family member or a professional who knows them well. This should always be done with the individual's permission.

Later on, when gathering evidence to check against the baseline, the befriender / mentor and the referrer can also be asked their opinion on the progress of the befriender / mentee. Evidence of change is stronger when it is gained from more than one source.

What Do Funders Want?

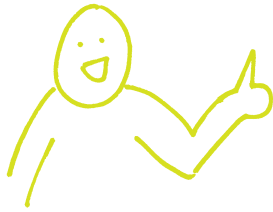
Funders want to see evidence that projects have:

- taken a baseline against which they can assess themselves
- achieved what they set out to achieve
- included both quantitative and qualitative information
- demonstrated success in softer outcomes.



Projects tend to be very good on the quantitative side of project activities but whilst they can tell you they know softer outcomes have been achieved, they often fail in providing sufficient evidence to support this ... Examples of softer outcomes that seem particularly difficult to measure are reduced isolation, increased community participation, increased self-worth, improved independence, improved health and well being (physical or mental) and improved organisational capacity/ability.

Funder

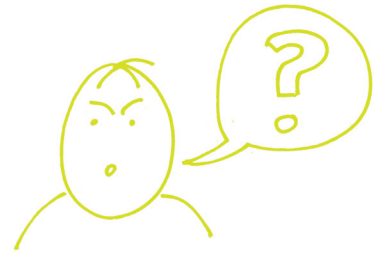


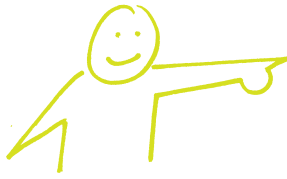
Practical Tips

- Match each outcome with a set of indicators
- Use both outcomes and indicators as a reference when drawing up referral forms or baseline questionnaires
- Try to get a mix of quantitative and qualitative indicators
- Use the process of setting indicators as a way of checking whether your purpose is too ambitious
- Get baseline information as soon as possible
- Whenever possible, check information against more than one source

Tough Questions

- Do our indicators of success clearly relate to what we are trying to achieve?
- Have we got indicators of success for everything we are trying to achieve?
- Have we devised a way of getting a baseline measurement with befriendeds/mentees which relates to our indicators of success?
- Do we know what befriendeds/mentees want out of the project?
- Have we made the process as confidential and non-intrusive as possible?





Useful Resources

The Big Picture (SCVO 1999) outlines indicators for stakeholder satisfaction and processes, which are very helpful for monitoring purposes.

www.centreforconfidence.co.uk – the Centre for Confidence and Well-being is based in Glasgow and aims to improve confidence within the population of Scotland. one of the ways it works is through the development of tools for evaluation and the Centre's website includes some interesting information and materials.

ESS publishes a series of support guides on evaluation. Particularly relevant is ***Support Guide 2: Developing and Using Indicators***, available at:

www.evaluationsupportscotland.org.uk

Evaluation Planning Table

From Evaluating Community Projects (Joseph Rowntree Foundation)

| Indicators | What information do you already have? | What additional information do you need? | What methods will you use to gather the additional information? | Who will take responsibility for gathering this information? | When do they need to it by? |
|-------------------------------------|---------------------------------------|--|---|--|-----------------------------|
| Voice hearers go out more regularly | Weekly diary as base-line | Where they go now | Updated weekly diary | Befriender | Monthly |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

The Relationship Map

This is a tool taken from a person centred planning tool called Personal Futures Planning. Using this framework, you can help the befriender/mentee to identify the important people in their life. The idea is that you put the people closer to or further from the befriender/mentee in the middle, depending on the closeness of their relationship with the befriender/mentee (from the befriender/mentee's perspective).

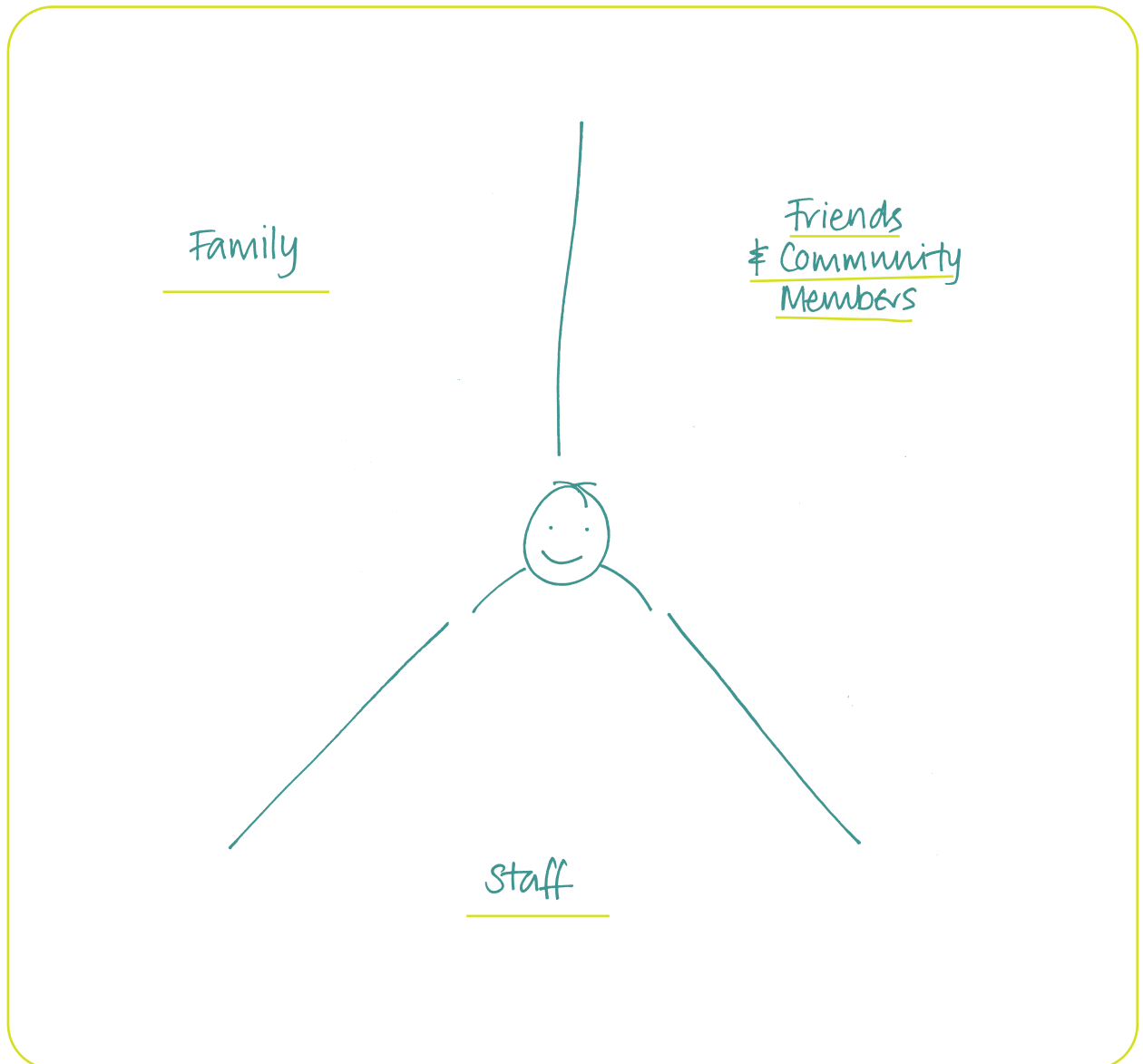
It's good because it's visual. Initially it helps us to explain what the project is all about. It has a lot of impact as people see changes in their circles – even adding one person is a big deal.

Project Manager

This will give you a snapshot of the befriender/mentee's connectedness or otherwise at a given point in time. Using this at intervals throughout the befriending/mentoring relationship or at the beginning and end, you will be able to measure whether the befriender/mentee's social isolation has reduced.

Used with the befriender/mentee, this tool can be used to help the befriender/mentee to identify relationships that could be strengthened or deepened. These might be existing relationships with family who the befriender / mentee has lost touch with or with community members who the befriender/mentee would like to get to know better.

The Relationship Map



Circles of Friendship

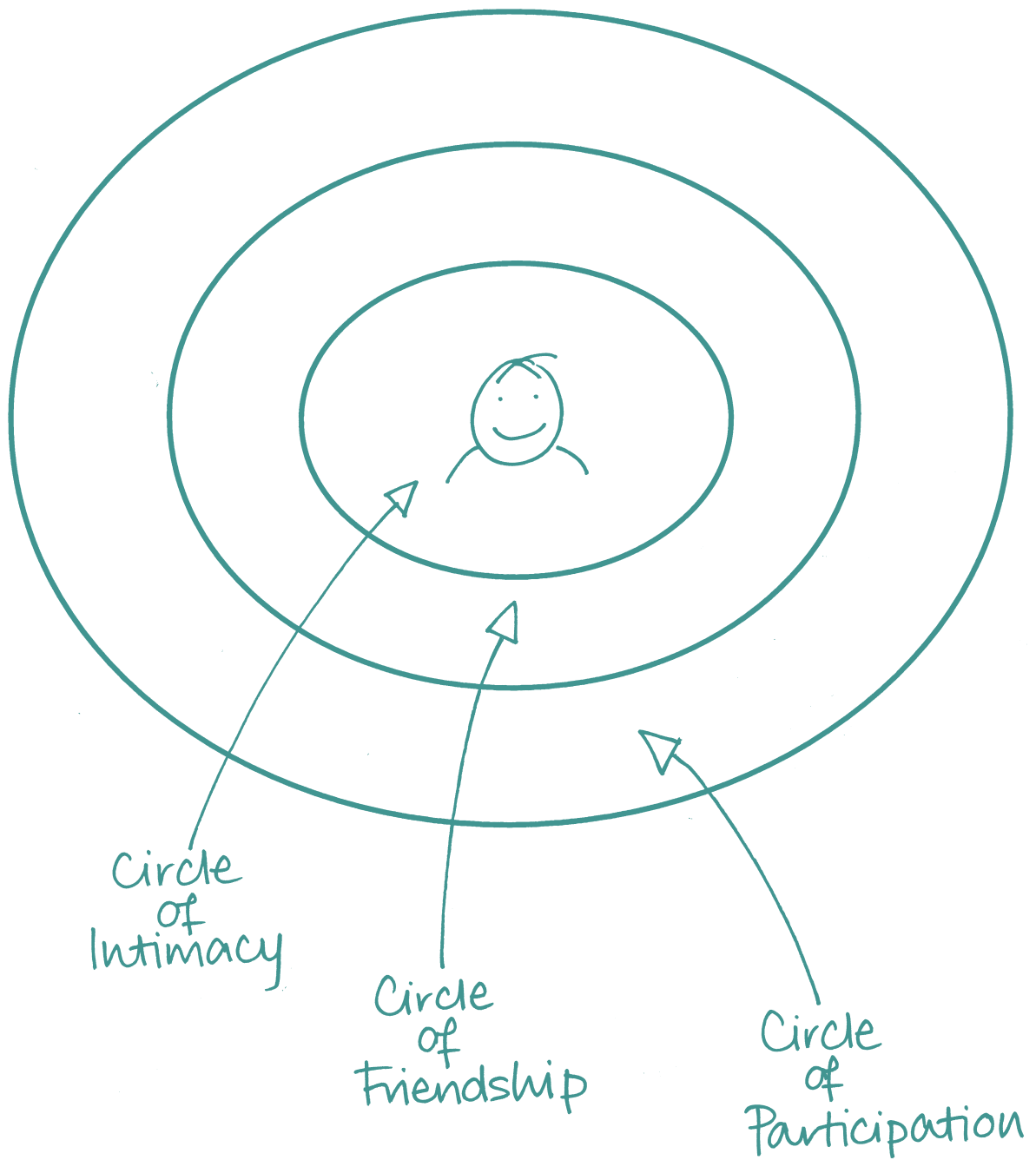
This is a version of a tool originally offered by Judith Snow (a disability rights activist) to help people consider their social networks. It is similar to the Relationship Map in that it is intended to demonstrate the person's isolation or connectedness.

Again, it is completed from the befriender/mentee's perspective. In the Circle of Intimacy the befriender/mentee includes those people who are really close to them – sometimes called 'anchors'. The Circle of Friendship includes other people that the befriender/mentee has a genuine friendship with, not just acquaintances. The Circle of Participation is useful for helping to think about groups and associations (work groups, social groups, interest groups) that the befriender/mentee is involved with.

If the befriending/mentoring has the role of bridge-building (i.e. supporting the person to develop relationships with others) the Circle of Participation is a useful place to start, since most of our friendships arise out of this circle (colleagues, neighbours and people we meet in activity groups who become friends).

This tool can offer useful starting points for community bridge-building work and can, like the Relationship Map, be completed at intervals to reflect progress in reducing social isolation.

Circles of Friendship



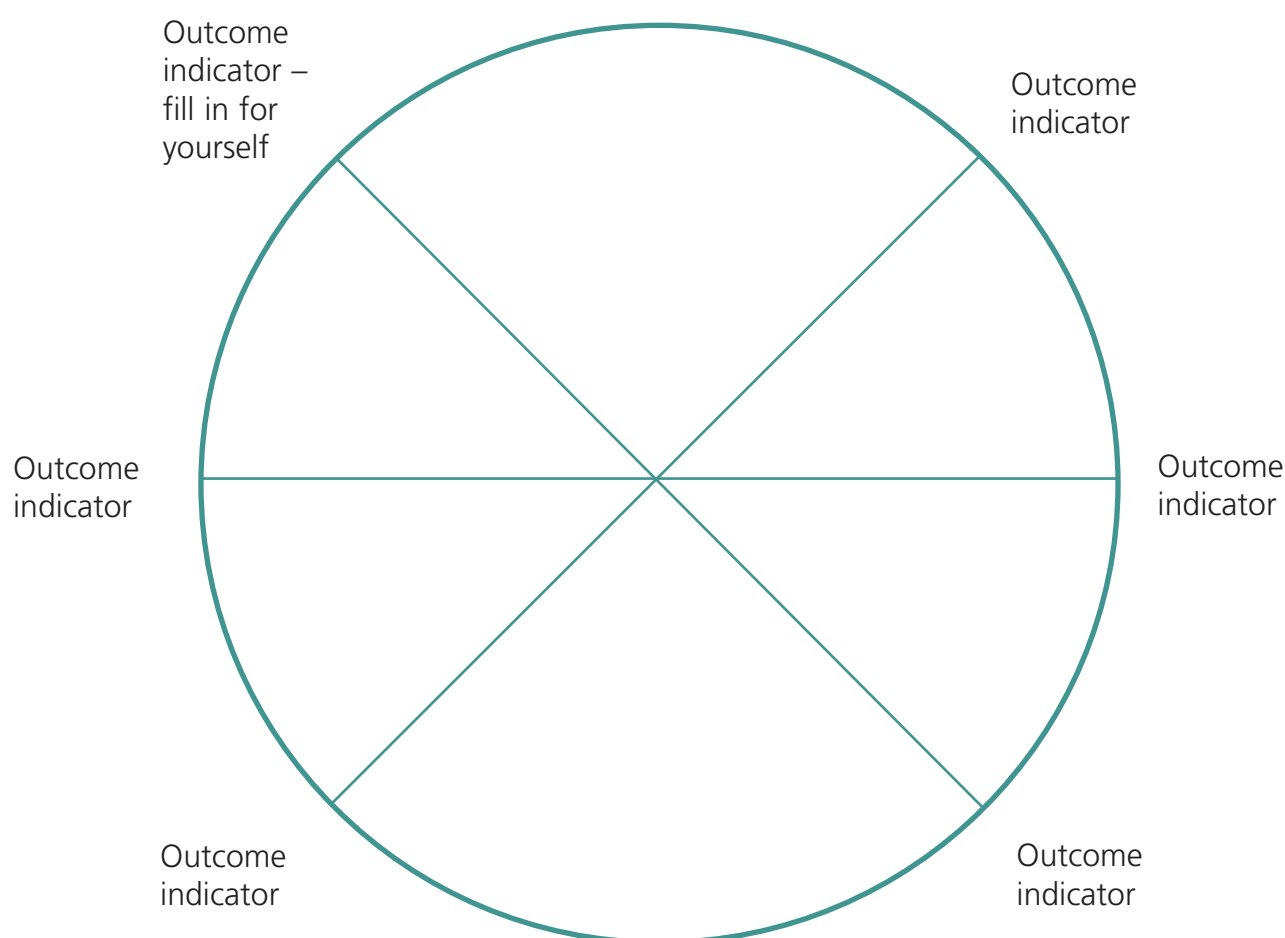
Outcomes and Outcome Indicators

| What is the difference we want to make? | How will we know when we get there? |
|---|-------------------------------------|
| | |
| | |
| | |
| | |

Weekly Diary

| | What do I do? | What do I do? | Who am I with? |
|-----|---------------|---------------|----------------|
| Mon | | | |
| Tue | | | |
| Wed | | | |
| Thu | | | |
| Fri | | | |
| Sat | | | |
| Sun | | | |

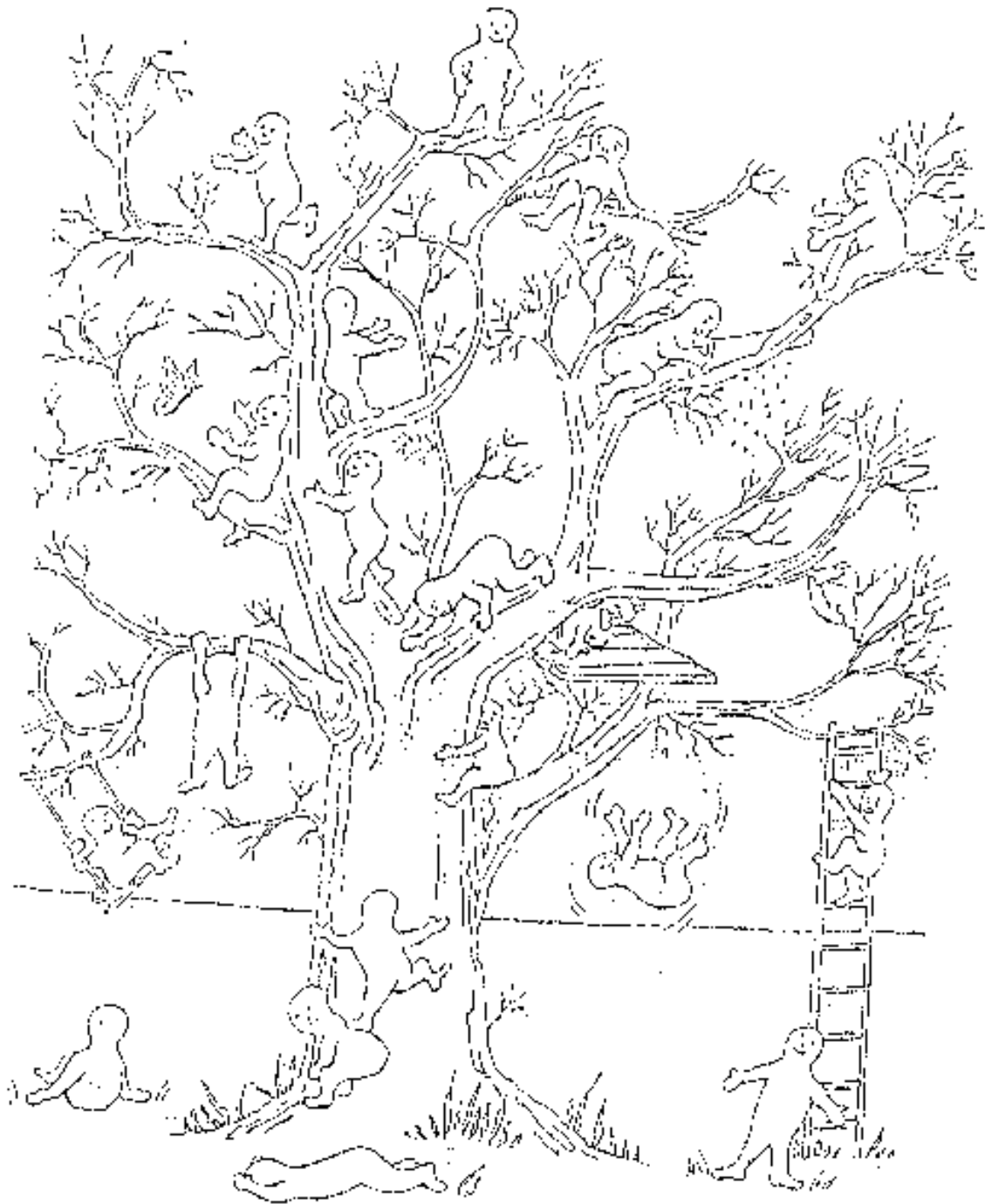
Evaluation Wheel



How to use the evaluation wheel

1. The wheel should relate to an outcome, for example self confidence.
2. Each spoke should relate to an indicator of self confidence. In other words things that would show that the young person is more confident. The young person can decide for him or herself what should go on each spoke or you can decide beforehand.
3. The young person then marks where they think they are on the spoke. The closer to the centre the less knowledge or confidence they have. This is the baseline.
4. Revisit this exercise on a regular basis to if the indicators have changed over time.
5. You can link the two dots on each spoke to give a visual representation of any change. Or you could photocopy the baseline onto acetate and lay it over a new wheel to show change.
6. You can pull together the results of different young people onto a group wheel to show change for a collective group of young people and use the wheel as a visual representation in your report.

Evaluation Tree



How to use the evaluation tree

Ask the young person to point or colour in a figure on the diagram to show how they feel and then you can talk about why and where they would like to be. For example if they are at the top of the tree they might be feeling on top of the world. If they are clinging to a branch maybe that's because they feel they can't cope very easily and no one is helping. Do the exercise again at regular intervals to show any change.

The Volunteer Centre Edinburgh Self-Assessment Scale

Mentee's Name: Mentor's Name:

Date:

Please select one of the responses (1,2,3 or 4) for each of the statements below. When responding, you should think about how you have felt generally over the last week.

1 – Not at all 2 – A little 3 – A lot 4 – Always (or almost always)

Confidence: "I feel confident in myself and my abilities".

1 2 3 4

Motivation: "I find it easy to get and stay motivated when thinking about employment"

1 2 3 4

Interaction: "I find it easy to spend time with other people"

1 2 3 4

Asking for Help: "I can ask for help when I need it"

1 2 3 4

Daily/Weekly Routine and Structure: "I have a regular routine which I find easy to stick to"

1 2 3 4

Planning and Prioritising: "I can prioritise my activities and stick to the plans I make"

1 2 3 4

Readiness for Work: "I feel quite ready to start paid employment."

1 2 3 4

CV/Applications: "I am confident in my ability to write an application form or compile a CV"

1 2 3 4

Interview Readiness: "I feel I would interview well if I had an interview tomorrow"

1 2 3 4

BEFRIENDERS HIGHLAND – FRIEND REVIEW

NAME _____ DATE _____

Please rate yourself on the scale (any number from 1–10) in the following areas, where 1 is 'low' and 10 is 'high'.

| | |
|---|--|
| Confidence when meeting people | |
| Confidence to take part in activities | |
| Confidence to take part in conversations | |
| Feeling of contact or involvement with others | |
| Feeling of belonging to your local community | |
| Ability to go outside your home | |
| Interest in life generally | |
| Your general self confidence | |
| The overall impact of befriending on your sense of well-being | |
| Other – please describe below | |
| How do you feel about completing this questionnaire? | |
| Would you like to make any other comments? | |

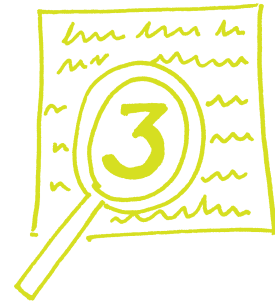
Rosenberg Self Esteem Scale

Circle the appropriate number for each statement depending on whether you strongly agree, agree, disagree, or strongly disagree with it.

| | Strongly agree | Agree | Disagree | Strongly disagree |
|--|-------------------|-------|----------|----------------------|
| On the whole, I am satisfied with myself. | 1 | 2 | 3 | 4 |
| At times I think I am no good at all. | 1 | 2 | 3 | 4 |
| I feel that I have a number of good qualities. | 1 | 2 | 3 | 4 |
| I am able to do things as well as most other people. | 1 | 2 | 3 | 4 |
| I feel I do not have much to be proud of. | 1 | 2 | 3 | 4 |
| I certainly feel useless at times. | 1 | 2 | 3 | 4 |
| I feel that I'm a person of worth, at least on an equal plane with others. | 1 | 2 | 3 | 4 |
| I wish I could have more respect for myself. | 1 | 2 | 3 | 4 |
| All in all, I am inclined to feel that I am a failure. | 1 | 2 | 3 | 4 |
| I take a positive attitude toward myself. | 1 | 2 | 3 | 4 |

This scale has no copyright restrictions. You can get more information on how it is being used by typing 'Rosenberg self-esteem' into an internet search engine or by reading Rosenberg, Morris; Society and the Adolescent Self-Image. Middletown, CT. Wesleyan University Press. 1989

Gathering Evidence



This section examines:

- How you decide what evidence to gather
- When you gather evidence
- Where you gather evidence
- What kind of evidence you are looking for
- Ways of gathering evidence
- How people are doing it now

The secret of gathering evidence is to gather only the information you are going to use, and to record evidence as you go along. In fact, most projects are engaged in gathering evidence as part of their day-to-day activity, but they wouldn't necessarily call it that, and they don't always write down the information they gather.

Link Befriending Project in East Fife provides support to 16 young people with mental health issues. All the young people are referred from the same source and the co-ordinator meets with the referrer monthly to check on progress with befriendees and deal with any new referrals.

She also meets with volunteers once a month to hear how the match is going from their perspective. Regular, informal social nights give volunteers and befriendees a chance to get to know each other.

We want to encourage organisations only to measure what they need to measure to show the difference. They need a system for collecting relevant information

(Funder)

Link Befriending

As is the reality for many projects, the coordinator is the only paid worker and she carries much of the information about the project in her head. She can tell you what is working and what's not working about the project during the course of an informal conversation, and her evidence is based on all the contacts she has with users of the project, the befrienders and the referrer.

But she acknowledges the importance of writing down as much evidence as possible. A referral form is filled in at the beginning by the referrer, which identifies the issues which led to the referral. The referrer also fills in a six-monthly evaluation form, giving details about the quality of the service and the young person's progress.

Volunteers and befriendees fill in forms at the end of the match, which ask them both what they thought of the quality of the service, and, what they got out of it. Volunteers also fill in contact sheets after each meeting, which they present to the coordinator during monthly meetings. These contact sheets are attached to expenses sheets to encourage volunteers to fill them in.

So the coordinator has at her fingertips a wide range of evidence, which she uses for a variety of purposes from reports to her board, to funding applications, to celebrating success with individuals.

There are two kinds of evidence a project needs to collect. The first, is evidence which relates to outcomes and outcome indicators – the difference the project is making to service users.

The second, is evidence to show that the project is functioning in the most equitable and efficient way possible. This kind of evidence relates to *the way* the project goes about achieving what it sets out to achieve, the outputs or activities of the project, for instance, recruitment and training of volunteers.

In practice it often makes sense to gather both kinds of evidence at the same time, to save time, and to avoid over consulting people.

How Do You Decide What Evidence To Gather?

The best way is to refer back to the difference you want to make and how you will know when it is different – the outcomes and outcome indicators referred to in the previous two sections. These will give you clear guidance as to the kind of information you need to collect.

The Bridging the Gap table overleaf matches outcome indicators with possible methods of gathering the information. It shows how one method, like a feedback form, can yield information that applies to several outcomes.

Two kinds of evidence that you need to collect:

- evidence relating to the difference the project is making
- evidence relating to how the project goes about making that difference

Equity: the equality of opportunity, relative to need, to participate in and benefit from the project.

Efficiency: the ratio of resources used to outcomes achieved.

Bridging the Gap

| What is the difference we want to make? | How will we know when we get there? | What methods could be used to gather the information? |
|---|---|--|
| Voice hearers are less isolated | <ul style="list-style-type: none"> • Voice hearers go out more regularly • Voice hearers go to more places • Voice hearers attend more groups • Voice hearers tell us they feel less isolated | <ul style="list-style-type: none"> • Before and after forms for voice hearers • One to one interviews • Focus group with voice hearers • Circles of friendship map |
| Voice hearers explore new opportunities for personal development in the community | Increased number of voice hearers take up a variety of community-based opportunities for personal development e.g. community-based adult learning, college courses, employment, volunteering, new business development | <ul style="list-style-type: none"> • Before and after forms for voice hearers • One to one interviews • Focus group with voice hearers |
| Voice hearers have more acceptance of their condition and access support more effectively | <ul style="list-style-type: none"> • Voice hearers have joined the self help group and contributed to group meetings • Voice hearers talk about their condition more openly • Voice hearers feel more in control of their support • There is an increase in the number of voice hearers getting involved in training and becoming activists | <ul style="list-style-type: none"> • One to one interviews with voice hearers • Focus group with self-help group • Interview/questionnaire to other professionals (with permission from voice hearer) |

| | | |
|--|--|--|
| <p>Befrienders gain skills and experience in mental health issues</p> | <ul style="list-style-type: none"> • Befrienders tell us that they have increased their skills • Befrienders demonstrate that they have more understanding of voice hearing (through the use of an assessment tool) • Befrienders attend training courses on mental health, stress, voice hearing and recovery • Befrienders go on to be involved in work or other activities related to mental health | <ul style="list-style-type: none"> • Before and after forms for befrienders • Interviews with befrienders • Training evaluation forms • Results of assessment tool used with volunteers during before and after training |
| <p>Bridging the Gap continues to learn and develop on the basis of feedback from befrienders and befriendees</p> | <p>There will be changes in the project based on feedback from befrienders and befriendees</p> | <p>Minutes from board or team meetings which show project change based on feedback</p> |

When Do You Gather Evidence?

Evidence needs to be gathered on an ongoing basis to ensure that you are doing what you said you would do. This checking process is called **monitoring**, and allows mistakes to be picked up, or issues to be dealt with as soon as possible.

Evaluation takes place when you review the evidence to see whether outcomes are being achieved and the project as a whole is functioning equitably and efficiently.

It is important to do this at least once or twice a year. The project manager could do it on her own, in supervision, in a team meeting, or at a special evaluation meeting where board members, project staff, users of the service, volunteers and other stakeholders can give their perspectives.

Where Do You Gather Evidence?

Evidence is gathered from:

- Befriendees or mentees
- Befrienders or mentors
- Referrers
- Family members
- Project staff

There are two issues to consider when to gathering information about individuals.

Confidentiality

Befriendees/mentees might be reluctant to give information about themselves at the beginning of a project and they may not want their family or other professionals involved.

Data protection

The Data Protection Act (1998) requires that:

- you only collect information that you genuinely need
- it is only used for the purposes it is collected for
- the information is not passed to anyone else
- the person has a right to view to all the information kept about them
- the information is accurate, held in a secure place, and deleted when no longer needed.

For the Data Protection Act see www.dataprotection.gov.uk

So a balance needs to be struck between respecting individual wishes, maintaining confidentiality, being clear about data protection, and being able to demonstrate the impact of your project.

At first there can be resistance from service users and volunteers, as well as from staff, to filling in the forms and answering lots of questions . . . It really helps to explain the purpose of it all clearly. Once people understand that we're doing it to improve the service and to get funding in the future then they are usually much more willing to take part.

Project Manager

What Kind of Evidence Are You Looking For?

You are looking for a balance between *qualitative* evidence, which relates to how people think and feel, and *quantitative* evidence, which relates to numbers. Interviews or focus groups often provide good qualitative evidence, and self-assessment forms or relationship maps are very useful for providing quantitative evidence, e.g. 10 befriendees had 3 or more extra people in their social network or 6 mentees had enrolled in further training.

If you are using a questionnaire, 'closed' questions provide good quantitative evidence, e.g. Do you think you benefited from having a mentor? They can be matched with an 'open' question providing qualitative evidence e.g. What difference do you think having a befriender has made to you?

Closed questions are those which require a yes or no answer, open questions often start with how, who or why and require a more detailed description.

The priority is to collect enough evidence to show that you are achieving what you set out to achieve and, obviously you need to show that you are doing this within your timescale and within budget.

But you also need to collect evidence relating to the outputs and activities of your project and the way you deliver them. This information enables you to work out how efficient your project is. It is often very easy to gather, through feedback forms or informal meetings.

The sorts of information you might be looking for here include:

- Staff to volunteer ratios
- The amount of support and training volunteers and staff receive
- Volunteer and staff satisfaction with support
- Retention and absentee rates of volunteers and staff
- Length of waiting lists for service users
- How often service users meet up with volunteers and what they do together
- Methods of communication within the project
- Methods of communication with partner agencies and referrers
- The overall costs of the project and how the money is spent
- Where referrals come from and how appropriate they are

Ways of Gathering Evidence

There are a variety of ways of gathering evidence. Much of it can be done as part of day-to-day work practice and some of it requires extra work. Sometimes other

professionals can help to make it more fun. Arts and youth workers in particular, are often very creative in devising interesting and involving ways of gathering evidence.

Several methods are listed below, some are part of day-to-day work practice and others require special events. All methods involve asking questions and these questions should always relate directly to the difference you are trying to make as a project. So, if your project sets out to reduce isolation, some of the questions should relate specifically to changes in a befriender / mentee's social network. Asking questions in this way means that you can relate the information directly to the outcomes you set out to achieve. However, you should always include a very open question that allows people to tell you about the unexpected outcomes of the project.

If you have a large number of service users, you may want to choose a few for a more in-depth analysis. There are two ways of doing this:

- Randomly – for instance choosing every tenth person on the database
- Deliberately – choosing individuals who represent a range of characteristics eg. Gender, geographical location, age.

This process is known as 'sampling'.

The methods you use should be appropriate to:

- the capacity of your project to undertake them
- the needs and preferences of your service users.

Overall we want monitoring practices to provide the evidence of achievement but also to take cognisance of the needs of the client groups e.g. for older or disabled groups we would hope that the monitoring was done in a sensitive, non-evasive or intrusive manner. This can lead to projects creating and using innovative ways of monitoring, which we welcome.

Funder

A referrer recently said that it took us too long to find befrienders for her clients. Because I had 'date received' and 'date matched' fields already in the database, I was able to prove that over half of the 66 befriendees during the past year were matched within 16 weeks.

Project Manager

I get the biggest feedback through volunteers.

Project Manager

Contact / supervision sheets

Contact or supervision sheets are often filled in by volunteers each time they meet up with their befriender / mentee. They should ask specific questions about progress of befriendees / mentees.

Many projects struggle to get volunteers to fill in these sheets, some (like Link) now ask them to do so as part of claiming their expenses, which forms an incentive.

Reflective Diaries

These can be used both by volunteers and/or befriendees/mentees to track progress over time. They allow scope for people to make them as personal and creative as they like.

Records

Basic record keeping including information on referrals and matches is very useful evidence.

One-to-One Meetings

Project managers and workers spend much of their time in meetings with volunteers, befriendees/mentees, referrers and family members. These meetings are a very good source of information both for establishing baselines and for monitoring progress.

To turn these meetings into evidence, you need to take minutes or allow yourself time to make a few notes highlighting problems or showing progress in relation to baselines, making an effort to use people's own words where possible.

Feedback sheets

Self-assessment questionnaires, such as Rosenberg or Rickter used as a baseline (see Section 2) and at regular

intervals with service users, are very useful ways of gathering quantitative evidence of change for individuals (see Top Tips for designing feedback sheets p.85).

Questionnaires can also be used with referrers and volunteers – the New Deal examples of these are provided at the end of this section. They include both open and closed questions, yielding both quantitative and qualitative information. Questionnaires could also include symbols such as smiley faces (see handout on page 86)

Remember, when devising a questionnaire, questions should be designed to reveal information about the outcomes of the project.

Questionnaire response rates can be quite low if they are simply given to people to fill in and send back, (although including a stamped addressed envelope helps). It is often more effective for a staff member or volunteer to fill them in with the respondent, either by phone or face to face, though the questionnaire will no longer be anonymous and the process may turn into more of an interview.

Evaluation sheets

Any kind of training for volunteers should automatically include an evaluation sheet asking participants about what worked well and what could be improved.

Social events

Social events can be great occasions to gather information about progress. This can happen through informal conversations, through a comments book, which you invite people to fill in, or through questionnaires, which you fill in with people as they are having fun. The Befriend a Child project in Aberdeen asked kids what they

By far the best way for continually monitoring most of our befriending matches has been not only usual, regular calls, meetings and six monthly reviews, but also by providing a section on expenses claims for 'description of activities and outings' from which we pick up many things befrienders are doing.

Project Manager

thought about the befriending project as part of a trip to the safari park.

Case Studies

Projects often write case studies of individuals to show progress. These are very effective, particularly when accompanied by photos (with the person's permission, of course). The temptation is to choose those who have benefited most out of the project but it is worth trying to choose a cross-section of service users representing the different kinds of people the project supports. Descriptions of individuals who had been stuck in a pattern of behaviour making small but significant changes can often be as compelling as descriptions of individuals who have changed their lives completely. Including the challenges or frustrations, as well as the successes lends an authenticity to your stories.

When writing case studies, it is best to use peoples' own words as much as possible, and ideally ask them to do it themselves. The Integr8 evaluation described later includes good examples of using case studies.

Evaluation meetings

Evaluation and review meetings can take place at any time in the life of a project. They are good occasions to bring a variety of people together and to use creative ways of getting comments on the project. These could include graffiti walls, where people write their views on big charts round the room, story-telling, 'big brother' diary rooms, song-writing workshops or exercises, which involve people placing themselves on scoring grids marked out on the floor or wall. Some simple activities for meetings are included at the end of this section.

Before the meeting you need to decide what it is you want to get information on, and what is the best way of doing that, considering who is coming. An outside facilitator might be useful, particularly if s/he brings skills in creatively involving people.

Interviews

Formal one-to-one interviews are often useful ways of obtaining more in-depth information. (see 'Top Tips for Conducting an Interview' p. 84).

Suggestions Box

A suggestions box which sits on the desk in the project office, could be a good way of getting feedback from people who would rather remain anonymous.

Focus Groups

Focus groups are traditional and useful ways of gathering information (see 'Top Tips for conducting a focus group' p.83).

In our experience a thank you letter to a volunteer when leaving the project often says we may be in touch for evaluation purposes and follow up with an invitation for a coffee and a chat works too!

Project Manager

How Are People Doing It Right Now?

In researching this pack we found creative and effective examples of how people go about gathering evidence, as well as indications of some of the difficulties.

Integr8

Integr8 is a befriending scheme providing support to vulnerable young people in West Lothian. In 2006, the Coordinator carried out a review of the first three years of the service. She consulted with 16 young people, 11 volunteers, 6 parents and 6 referring agencies, using a variety of methods.

Focus group sessions for both befrienders and befriendees were incorporated into summer residentials in the Highlands. 'Various fun and creative activities were used to enable young people to express themselves as safely and easily as possible, such as 'pizza' making and before and now cartoons' (Coordinator).

Interviews were carried out with befrienders and their matched befriendees and these were included in the project's newsletter.

Telephone questionnaires were also carried out with young people, parents and referral agencies. Questions were primarily 'closed' but interviewees were also given the chance to add comments.

The final report includes the following evidence:

- photos of befrienders and befriendees
- case studies
- before and after stories
- photos of 'pizzas' (pizza-shaped collages used by befriendees to describe their experience of befriending)

- quotes from befriendees
- statistics relating to what befriendees, parents and referrers thought of the service e.g. 84% of parents thought their child had benefited, 66% of referrers have seen an improvement in the young person's emotional well-being and mental health

For the full report which includes details of their monitoring and evaluation tools see

www.wlyap.org.uk/files/integr8%20Report%20Final.pdf

At re:discover, the matches are monitored after one month and thereafter at three-month intervals at meetings involving the service user, volunteer and the Support and Development Worker. These meetings are used to review goals and to assess the progress of the match, as well as to check that the project is providing adequate and appropriate support to the service user and volunteer.

re:discover is interested in measuring the impact on volunteers as well as on service users. Volunteers complete supervision diaries, which they discuss with their allocated Support and Development Worker at regular intervals. After every meeting with the service users, the volunteer is encouraged to report back to the project. A self-rating scale is used at the end of the match to measure volunteers' feelings about themselves and their capacities as a volunteer. There is also an exit questionnaire for volunteers, which is used to assess the impact of the volunteering role on the individual.

re:discover

Link evaluation

A researcher undertaking an evaluation for Link Befriending Project prepared an assessment spider gram Figure (a) and developed it around some of the common outcome indicators identified for befriending and mentoring relationships.

She held an evaluation workshop to which befriendees were invited. They plotted themselves on the spider gram putting a mark for where they were before they had a befriender and another mark to show their progress in relation to each outcome. Figure (b) shows how much they had progressed.

Befriendees also commented during the workshop on why they thought they had made progress. The researcher found that 'young people at Link enjoyed the experience of reflecting on their progression'.

Figure (a)

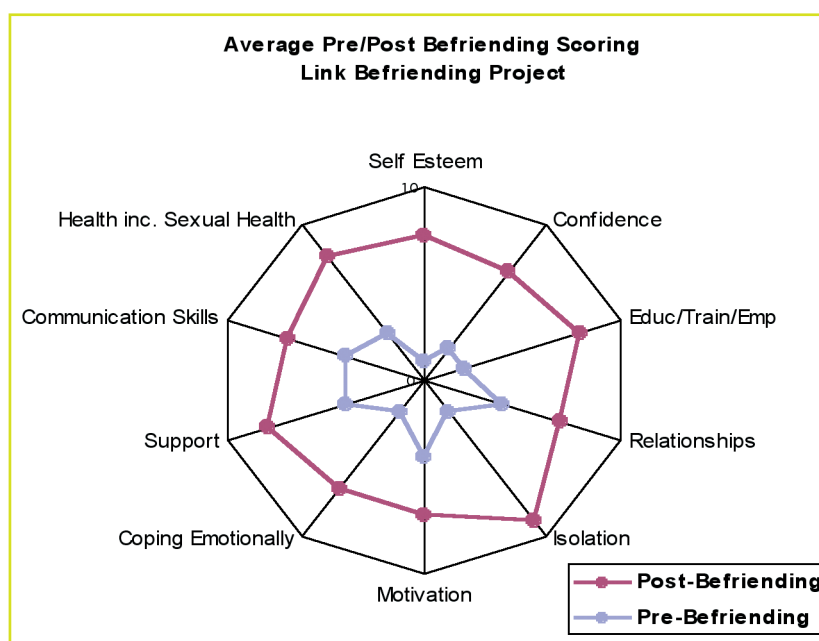


Figure (b)

| Categories | Pre-Befriending | Post-Befriending | Increase |
|----------------------|-----------------|------------------|----------|
| Self Esteem | 1 | 8 | 7 |
| Isolation | 2 | 9 | 7 |
| Education/Training | 2 | 8 | 6 |
| Confidence | 2 | 7 | 5 |
| Coping Emotionally | 2 | 7 | 5 |
| Health | 3 | 8 | 5 |
| Support | 4 | 8 | 4 |
| Relationships | 4 | 7 | 3 |
| Motivation | 4 | 7 | 3 |
| Communication Skills | 4 | 7 | 3 |

(More information on the evaluation is included in *This Is Mentoring*, published by the Scottish Mentoring Network. See References and Resources p.113)

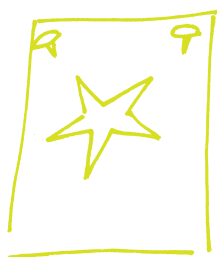
Glasgow Mentoring Network (GMN) supports New Deal clients who are on the Gateway to Work programme. The Gateway to Work programme extends for 15 weeks in all, and is mandatory for all 18–24 year olds claiming Job Seekers Allowance. Clients can choose to have mentoring as part of it. Mentees are assessed at the beginning of the programme using the New Deal Mentoring Review Form. Progress is measured using the New Deal Mentoring Final Evaluation Form (both forms are included at the end of this section). GMN is concerned to make the process as unintrusive as possible.

GMN

'The importance of sensitivity in mentoring evaluation cannot be overstated -- personal information can be uncomfortable to disclose! We need to make sure we ask appropriate questions . . . People shouldn't have to tell their stories, rather we

should keep focused on the goal (and necessary information), and our approach to evaluation should be consistent with this – mentoring can be about protecting people's space!'

Despite careful thought and sensitivity in the way questions are phrased, GMN struggles to get mentees to fill in the final evaluation form. Those who have got jobs want to disassociate from the world of unemployment and those who have dropped out of the system are hard to trace.



What Do Funders Want?

Funders are looking for evidence which shows that projects are achieving what they set out to achieve. For some, this might simply mean the number of people who got jobs. Others, might be much more interested in attitudinal and behaviour change. Most are looking for a mixture of quantitative and qualitative information but some are just looking for quantitative evidence – how many people got jobs, or how many matches were made.

Although case studies can be very powerful, they are not enough without other forms of evidence. Funders know that for every success story there could be two or three failures.

Our main interest is in seeing evidence of the impact of the interventions which . . . we have funded. I also want to know whether these meet the outcomes identified and agreed with the charity. I would also wish to know about success in meeting targets (including numbers of clients assisted). Ideally I would like to see some evidence of

learning from work to date e.g. we have altered our approach for year 2 based on our year 1 experience.

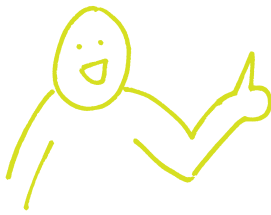
Some funders are very keen on innovative ways of gathering evidence whilst others don't have time to watch videos and would rather receive a concise and relevant report.

There is a tendency to offer up a case study as if it were telling the whole story – but it is just one case and I need to know how relevant that is in relation to all the clients.

Funder

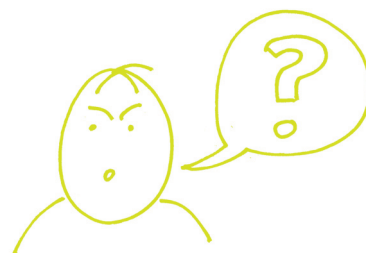
We like video diaries and think that projects should be using lots of different methods to evaluate.

Funder



Practical Tips

- Write down the things that people tell you as you go along – short quotes from service users or volunteers, professionals or family members can be very useful.
- Only gather information you think you can use.
- Think about what skills different members of your board / team have and how they could be used to gather information.
- When choosing ways of gathering information, think about your client group. Can you integrate evaluation with something they enjoy doing anyway? Young people might want to use song-writing as a way of saying what they think, older people might prefer a cup of tea and a blether (or the other way around!).
- 'Be organised in advance – keep your stats ticking along on a monthly basis and don't leave them till the end of the year they may never get done!' (Project Manager).
- Check with your funder about the kinds of evidence they are looking for.
- Independent facilitators bring skills and objectivity, but they cost money and need to be budgeted for.



Tough Questions

- Do you know what kind of evidence you need to gather?
- Are you gathering enough evidence to show that you are achieving your outcomes?
- Are you also gathering and recording evidence to show project efficiency and equity?
- Do you have a reason to gather all the information you gather?
- What do volunteers and service users think of the ways you use to gather information?
- Are the ways you use to gather information appropriate for your client group?
- Have you developed ways of gathering both quantitative and qualitative information?
- Do you have time to gather the information you need to gather? If not who else could do it?
- Are you having some fun whilst you are doing it?

Useful Resources

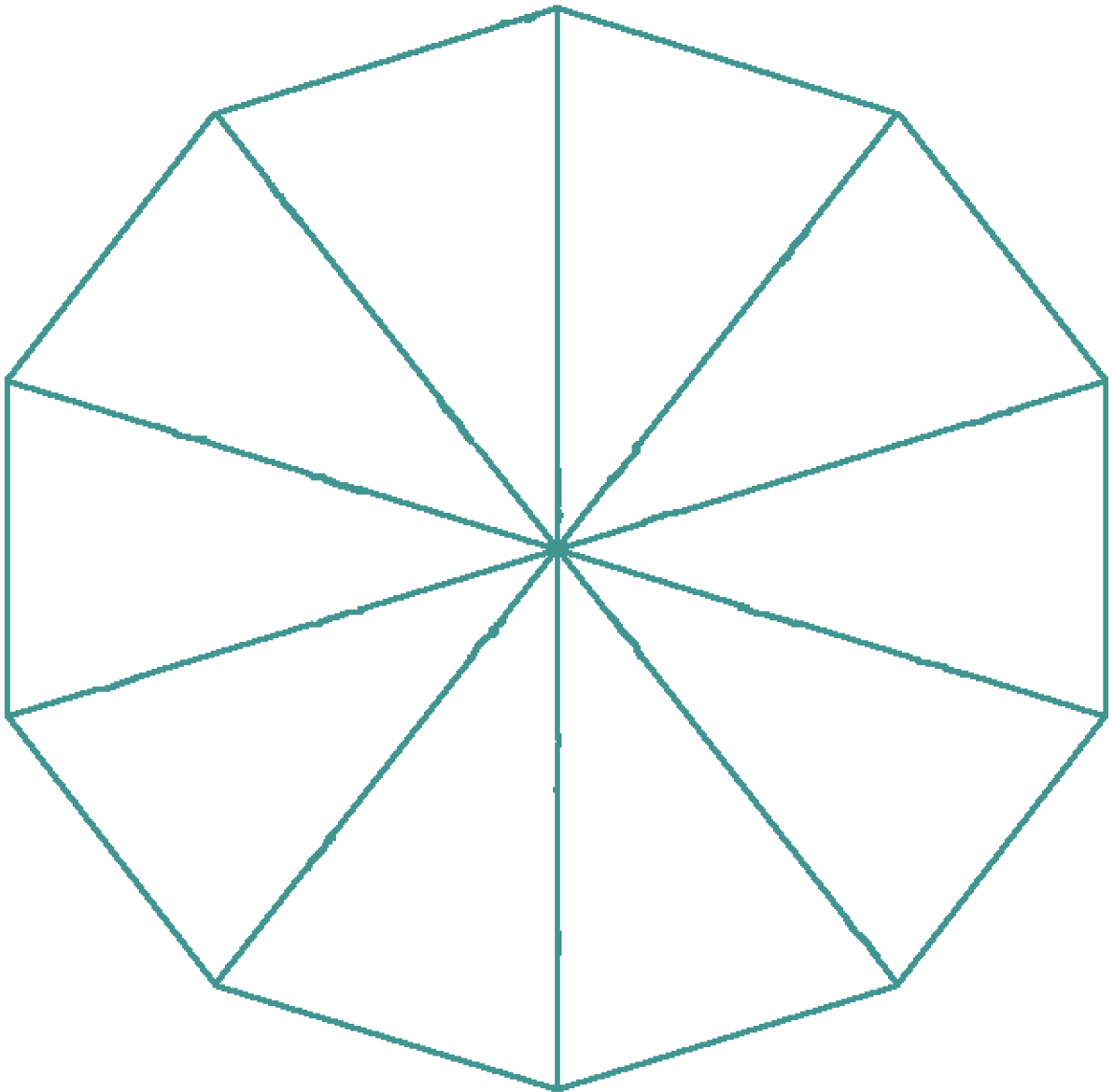
CHEX: Beyond the Anecdote is a pamphlet describing an interesting and engaging method of gathering evidence called Story Dialogue. It is available from CHEX, Suite 329, Baltic Chambers, 50 Wellington Street, Glasgow. G2 6HJ

Dean Jo, Goodlad Robina, Hamilton Christine: A Toolkit for Evaluating Arts Projects in Social Inclusion Areas (2001). This toolkit contains useful material on gathering information from a slightly more academic perspective. It is available from www.culturalpolicy.arts.gla.ac.uk

Impact of Volunteering Toolkit (Volunteering England 2006) provides some useful questionnaire formats for assessing the impact of volunteers. www.volunteering.org.uk

ESS publishes a series of support guides on evaluation. *Support Guide 3: Using interviews and questionnaires to evaluate your project*, and *Support Guide 4: Using visual approaches to evaluate your project*, are particularly relevant.

The Spidergram



Using the Spidergram

- Step 1: gather together a group of befriendees / mentees
- Step 2: ask them to define the purposes of the befriending/mentoring relationship
- Step 3: Draw a spidergram on the flipchart (or hand round photocopied versions).
- Step 4: mark each spoke of the spidergram with a separate purpose of the befriending / mentoring relationship
- Step 5: ask befriendees/mentees to place a coloured dot on the diagram to mark where they were on a scale of 0 to 10 at the beginning of the befriending / mentoring relationship (the centre counts as 0 and the edge counts as 10)
- Step 6: ask befriendees/mentees to place a coloured dot on the diagram to mark where they are on now on the diagram in relation to each purpose
- Step 7: discuss scores with befriendees/mentees
- Step 8: average them out for a report

New Deal Mentoring Review

Client Name_____

Nat Ins No___/___/___/___

Mentor's Name_____

Date of first Meeting ___/___/___

ND Agent _____

Date of review___/___/___

A.

1. How often have you met with your Mentor? (Please circle)

Once

Twice

Three times

Four Times

2. How comfortable do you feel with your Mentor? (Please circle)

| Very comfortable | Okay, we're just getting to know each other | | | Totally uncomfortable |
|------------------|---|---|---|-----------------------|
| 1 | 2 | 3 | 4 | 5 |

3. Have you agreed a "contract" (ground rules, when and how often you will meet, responsibilities, what you expect from one another etc.)

Yes/No

B.

1. Have you agreed objectives (what you want to get out of the relationship, formed a clear picture of what you hope to achieve)?

Yes/No

2. Has your Mentor helped you:

- Look for ways of achieving your goals? Yes/No
- Identify areas for development and set tasks to help you improve? Yes/No
- Identify areas of particular strength and helped to you to look for opportunities in your present situation to use these? Yes/No

C. Please complete the following by ticking the statements that apply to you:

- ☐ I am certain of what I need to achieve within my mentoring relationship.
- ☐ I feel confident that our objectives are realistic and feasible.
- ☐ I know what my Mentor expects of me.
- ☐ I have a good understanding of my Mentor.
- ☐ My Mentor has a good understanding of me.
- ☐ I feel relaxed during our mentoring meetings.
- ☐ I am happy to talk about myself and my views.
- ☐ I think we are well matched.
- ☐ We respect each other.

D. Self-assessment – On a scale of 0–5 please circle the no. that most reflects where you are at the moment.

| | | | | | | |
|--------------------------------------|---|---|---|---|---|---|
| Confidence | 0 | 1 | 2 | 3 | 4 | 5 |
| Communication Skills | 0 | 1 | 2 | 3 | 4 | 5 |
| Listening | 0 | 1 | 2 | 3 | 4 | 5 |
| Assertiveness | 0 | 1 | 2 | 3 | 4 | 5 |
| Ability to handle difficult people | 0 | 1 | 2 | 3 | 4 | 5 |
| Ability to handle awkward situations | 0 | 1 | 2 | 3 | 4 | 5 |
| Problem-Solving | 0 | 1 | 2 | 3 | 4 | 5 |
| Managing Change | 0 | 1 | 2 | 3 | 4 | 5 |
| Coping with new situations | 0 | 1 | 2 | 3 | 4 | 5 |
| Working in a Team | 0 | 1 | 2 | 3 | 4 | 5 |
| Technical Knowledge | 0 | 1 | 2 | 3 | 4 | 5 |
| Time Management | 0 | 1 | 2 | 3 | 4 | 5 |
| Attendance/Punctuality | 0 | 1 | 2 | 3 | 4 | 5 |

0: totally lacking, 1: not very good, 2: not too bad, 3: fairly good, 4: pretty good, 5: no problem!

New Deal Mentoring Final Evaluation

Client Name_____

Nat Ins No___/___/___/___

Mentor's Name_____

Date of first Meeting ___/___/___

ND Agent _____

Date of Evaluation___/___/___

A.

General (where possible give a short explanation)

1. How did you hear of the programme?
2. Why did you decide to take part?
3. Did the Awareness Session at the start give you enough information? Yes/No
4. If you answered no to the last question, what changes would you suggest to improve the session?

B.

Mentoring meetings

1. Approximately, how many mentoring sessions did you have?
2. Generally, where were your meetings held and how long (on average) did they last?
3. Did you feel meetings were held often enough and were long enough?
(Please comment)
4. At each meeting, did you:
 - Discuss what had happened since your last meeting, good and bad? Yes/No
 - Set goals for your next meeting? Yes/No

Mentoring meetings (cont.)

5. Thinking about your answer to B4:

... If you answered Yes

a. How useful was this a way of seeing your achievements? (Please comment)

b. How useful was this as a way of looking for opportunities to improve?
(Please comment)

... If you answered No

How would you describe your meetings, what kinds of things did you talk about?
(You do not have to be specific. A general answer will do.)

C.

You and your Mentor

| | |
|--|--------|
| 1. Do you think the Mentor was a reasonable match? Why? | Yes/No |
|--|--------|

| | |
|---|--------|
| 2. Do you think your Mentor was suitable for this programme? Why? (Your mentor will not see this evaluation) | Yes/No |
|---|--------|

D.

1. Benefits (Please tick those that apply to you)

- ☐ I achieved what I wanted to within my mentoring relationship.
- ☐ I have a clearer idea of where I'm going and how to get there.
- ☐ I enjoyed our meetings and benefited from the time we spent together.
- ☐ I felt my mentor was committed to working with me.
- ☐ If I had a problem with my Mentor we could discuss it reasonably.
- ☐ My mentor and I will continue to meet informally, I have their ongoing support.

2. What have you gained by being involved in mentoring?

- ☐ Clearer ideas about my career
- ☐ I've set and achieved goals
- ☐ Increased confidence
- ☐ Expanded my network
- ☐ Increased my skills

Other (Please list below)

E. Self-assessment (Please read the instructions carefully)

In the first review you completed we asked you to tell us where you thought you were in terms of all of the below. Now that you have come to the end of your Mentoring relationship, we would like you to do a similar exercise! *This time we've added another column!*

Obviously, lots of things contribute to improvements but, if you feel you have improved in any area, we want you to try and tell us by how much and how much of that improvement was down to being involved in the Mentoring programme.

Instructions

Part 1

Simply tell us how much you think you've improved by circling the appropriate number as follows

0 = got worse / 1 = stayed the same / 2 = got a little better / 3 = improved a lot / 4 = got nothing else to learn

Part 2

In the last column, please tell us what effect the Mentoring programme had on that change by writing in the appropriate Number. Choose from

Not a lot = 0 / Slightly = 1 / A great deal = 2 / No improvement would have been made without it = 3.

| | Mentor Contribution | | | | |
|--------------------------------------|---------------------|---|---|---|---|
| Confidence | 0 | 1 | 2 | 3 | 4 |
| Communication Skills | 0 | 1 | 2 | 3 | 4 |
| Listening | 0 | 1 | 2 | 3 | 4 |
| Assertiveness | 0 | 1 | 2 | 3 | 4 |
| Ability to handle difficult People | 0 | 1 | 2 | 3 | 4 |
| Ability to handle awkward Situations | 0 | 1 | 2 | 3 | 4 |
| Problem-Solving | 0 | 1 | 2 | 3 | 4 |
| Managing Change | 0 | 1 | 2 | 3 | 4 |
| Coping with new situations | 0 | 1 | 2 | 3 | 4 |
| Working in a Team | 0 | 1 | 2 | 3 | 4 |
| Technical Knowledge | 0 | 1 | 2 | 3 | 4 |
| Time Management | 0 | 1 | 2 | 3 | 4 |
| Attendance/Punctuality | 0 | 1 | 2 | 3 | 4 |

Top Tips for Running a Focus Group

- Allow 1.5 – 2 hours
- Run separate focus groups with befriendees/mentees, befrienders/mentors and referrers or other professionals to allow people to be open and share experiences
- An ideal number for a focus group is between 6-10 participants
- Ensure your venue is quiet and comfortable
- Ensure that travel expenses are available on the day
- Draw up your questions around your outcomes and outcome indicators
- Include a couple of open questions to allow people to tell you about unexpected outcomes
- Be flexible and respond to the interests of the group, but at the same time make sure you are getting the responses you need
- Take along another facilitator to record what people say or tape record the session

Top Tips for Conducting an Interview

- Allow 45 mins to 1 hour for each interview, either over the phone or face to face
- Try to get a cross section of interviewees who you think might represent different perspectives
- Draw up your interview schedule around your outcomes and outcome indicators
- Include a couple of open questions to allow people to tell you about unexpected outcomes
- Be flexible and respond to the interests of the individual, but at the same time make sure you are getting the responses you need
- Take extensive notes recording peoples' own words, or tape record the interview

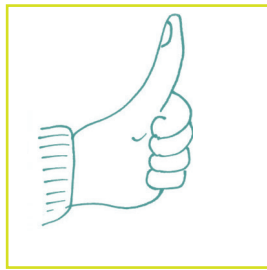
Top Tips for Designing a Feedback Sheet

- Design the feedback sheet around both your outcomes and outcome indicators (see voice hearers example in Section 2 p.35)
- Use the same one to measure your baseline and subsequent progress
- Design one for befriendees/mentees first and adapt it for use with referrers and befrienders/mentors
- Don't ask people for information you don't need e.g. a description of what people do together, rather than what has changed for the befriender/mentee
- Include some quantitative ways of measuring progress (see self-assessment scale examples)
- Include an open question, allowing people to tell you about unexpected outcomes

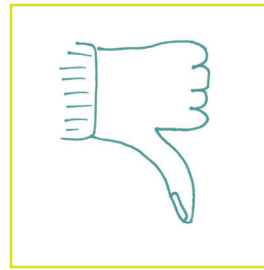
These tips could also apply to any kind of feedback sessions e.g. supervision sessions with befrienders / mentors or meetings with befriendees / mentees or referrers.

Sample Evaluation Tools

Thumbs Up



Thumbs Down



Smiley Faces (Scores of 1 to 5)



Evaluation Meeting Activities

There are a number of ways to introduce activities into a review meeting in order to vary the pace and make it more interesting and hands-on for participants. These include:

Writing key questions or points on flipcharts posted around the room. Ask people to write comments on the flipchart, or affix sticky dots, coloured post-it notes or smiley faces to indicate their choices and priorities. Collate and assess these quickly and use them as the basis for discussion.

Prepare sets of coloured card, on which are printed statements or comments that offer a range of responses to key questions. Distribute these to pairs or sub-groups of three to five people and ask them to spend a few minutes sorting the cards into three piles: most important, least important and in-between. Ask each pair/group to read out their choices, see how much agreement there is, and use it as the basis for discussion.

Prepare sets of coloured cards as above and distribute them. Each person looks at a card and decides whether they agree. If they agree they pass it on to another participant; if they disagree they put the card in the centre (on a table or in a box, for example). Do this three times. If a card survives three rounds it stays in. Then display the cards around the room and use as the basis for discussion.

At the same time, or separately, distribute blank cards to every participant/pair/group and ask them to brainstorm and write their answer(s) on the card. Swap these and read them out. Then display them around the room, for discussion and elaboration.

(taken from *Volunteering Impact Assessment Toolkit: a practical guide for measuring the impact of volunteering*. Volunteering England, 2006)

Analysing the Evidence and Learning from Evaluation



This section includes:

- Storing evidence
- Analysing evidence
- Adding value
- Learning from monitoring and evaluation
- How people are doing it now

Storing Evidence

In storing any kind of information on an individual, knowledge of, and adherence to, the Data Protection Act (www.dataprotection.gov.uk) is vital.

Most projects store evidence in a series of paper files dedicated to each individual. In itself, this is a form of database. Some projects have electronic databases. Common ones include Excel, Filemaker Pro (for AppleMac users) and Access. These can be used to store basic information such as names, addresses and phone numbers. Fields can also be created to store quantitative information, like the scores on a self-assessment questionnaire, but it is difficult to store qualitative information on an electronic database (see Apex Scotland example overleaf).

Wading through the files in order to extract the evidence needed to write reports or learn from evaluation can be a

Individual case files are very important – portfolios – make it fun and introduce it from the beginning – use pictures and comments from young people themselves, storybooks, (they) could belong to the young person.

Funder

challenge. Undertaking some sorting and compiling of evidence as you go along:

- Enables you to learn lessons and change practice immediately
- Makes your job much easier when the time comes to write it up

re:discover

re:discover befriending project in Edinburgh have developed a system whereby all the information on an individual, is compiled into an 'End of Match Report' (see p.105) which summarises the whole process. The Support and Development workers put these reports together on the basis of all the information collected, as each match comes to an end. The Coordinator uses them to feedback to funders, make new applications or support organisational learning.

Apex Scotland

Apex Scotland uses a computerised database.

There are separate paper forms for:

- Mentor and mentees to set and review goals on a three-monthly basis
- Mentor and mentees to track progress after leaving the service
- Employers to evaluate the progress of the work placement
- Employers to evaluate the service and support from the Employability Mentor
- Customer Satisfaction Survey
- Mentoring Exit Agreement

All the data from the forms is inputted into a computerised system called AIMS (Apex Information Management System). This system is used for keeping track of client

files and to record client progress, but it also provides a daily diary for the worker, which means that updating the files is a necessary daily task rather than an onerous additional pressure. It is easy to use and easy to search and forms a crucial part of the worker's toolkit.

Once inputted, the data is contained on a centralised database, which is accessed by staff at Apex headquarters in Edinburgh in order to compile statistical reports. Most of the information on this database is quantitative, relating to the Key Performance Indicators set by Apex Scotland (see p.30). Reports to current and future funders can be compiled from this data.

Such a system has obvious advantages. Information on what the project has achieved in relation to what it set out to achieve can be accessed at the touch of a button.

But there are disadvantages. There is no room for individuals to describe how they felt about the project, or even why they felt it worked or didn't work. The organisation is now considering how to record soft outcomes as it recognises there are many, both expected and unexpected.

Analysing Evidence

Analysing evidence is the process of matching what you set out to achieve, your outcomes, with what has actually happened to the individual service users or volunteers.

It is much easier to analyse evidence if the way you gather information is matched with what you have set out to achieve as a project, your outcomes and outcome indicators. So if you set out to increase confidence and the questions you ask people related directly to increasing

confidence then you can trawl through the information and pull out the relevant quotes and statistics.

If, on the other hand, you simply asked people how they benefited from the project, you may find that none of the data you gathered relates to what you set out to achieve.

Analysing evidence involves:

Stage 1

- Gathering together any baseline information you have
- Gathering together all the information you have on changes for service users
- Gathering together information on changes for volunteers (if relevant)
- Gathering together information about how the project has functioned (no. of people supported, how often, what did they do during sessions, length of waiting list etc.)

Stage 2

- Adding up quantitative information e.g. How many service users you supported, how many hours support they received, what their scores were on the self-esteem questionnaire, how many went on to get jobs ...
- Trawling through qualitative information e.g. Case studies, reports, interviews, focus groups – looking for themes and quotes

Stage 3

- Matching the information with what you set out to achieve (your outcomes) and your outcome indicators

This process of analysing evidence takes time and requires concentration, so switch off the phone and lock the door.

There are different ways of doing it but one method is to write each outcome on a separate piece of flipchart and attach the relevant evidence on individual post its.

For each outcome, you are looking for both quantitative and qualitative evidence. So, for instance if your first outcome was reducing isolation, having analysed the evidence you might end up with something like this:

10 of our 15 service users had more than 5 extra people in their networks at the end of the befriending/mentoring match. The other 5 had between 2-5 extra people. Mary said that 'she felt much more confident in going out and meeting new people', her community psychiatric nurse reported ' Mary's whole attitude to relationships has changed for the better'.

Adding Value

Obviously the best way to demonstrate the value of your project is to provide evidence to show how you make the difference you set out to make. However you might also want to show that you are doing something unique, that you can 'add value' to your community.

And it is true that funders are looking for 'value for money'. This phrase has a variety of different meanings and it might be useful to ask your funders how they understand it.

**We want people to show
how they 'add value'**

Funder

When funding organisations, trusts are not normally looking to replace statutory services but to 'add value' or innovation. Statutory funders might be looking for a proven reduction in the use of other services, something which could be hard to measure in the short term.

However, particular issues to consider in thinking about adding value or value for money could include:

- What staff to volunteer ratio do we need?
- What is our unit cost i.e. If we divide our total budget by the number of befriendees/mentees we support what does it come to?
- What is the minimum amount of staff time we need to put in to the befriending/mentoring relationship to get the most out of it?
- How long do we need to continue to support a befriending/mentoring relationship?
- What do we do that is different/unique/innovative?
- How will our service impact on an individual's current or future use of services?
- What efforts do we make to save money?
- How much do we save by using volunteers? (Volunteer Development Scotland recommends calculating this by estimating how much the task would cost if someone were paid to do it.)
- What 'in kind' support do we get?

Unit cost example

Barnardo's Scotland worked out that their children at risk befriending service cost £1,633 per child per year (in 2001). They argued that this investment was justified since they anticipated that future use of services such as criminal justice would be reduced. Link Befriending Project has worked out that the unit cost of their service to vulnerable young people is £1400 per year in 2005.

Length of support example

re:discover in Edinburgh set out to support a befriending relationship for a year. If both befriender and befriender wish to continue the relationship after that, they do so independently allowing the project to support another match. A time limited match, in which the time can be extended if necessary, demonstrates a belief that the intervention will have an impact within a certain timeframe and a commitment to support as many people as possible.

'In kind' support example

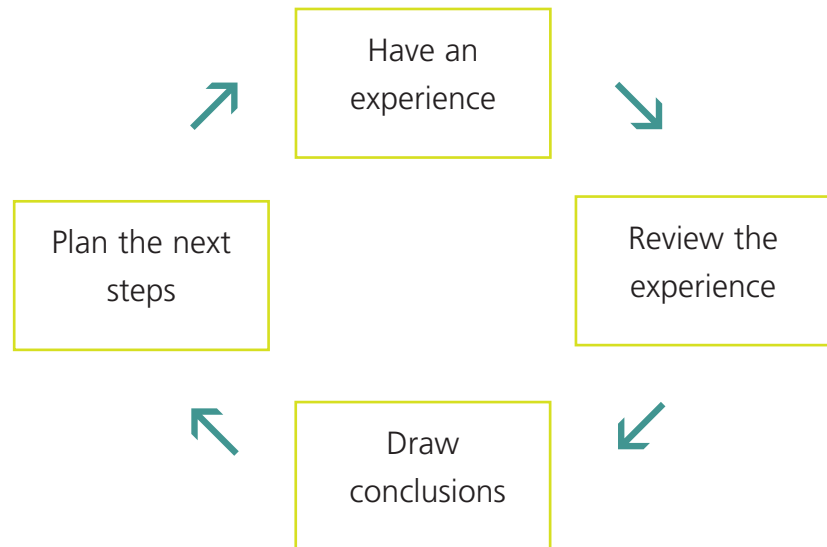
Funders need to know that projects are being creative in how they get support. Link Befriending Project organises group activities for befrienderes to give young people a chance to get to know each other and develop friendships. Its last night out for befrienderes and benders was organised by a corporate fundraiser, 'who wanted to give something back'. They went to Starlight Express at the Edinburgh Playhouse and out for a meal afterwards. Everything, including transport, was either donated or sponsored. Link's funder put them in touch with the corporate fundraiser. The experience taught the project manager that 'you just have to ask'. She now organises an annual barbecue for everyone who has ever been involved with the project. Meat is donated by a local butcher, soft drinks by local pubs, and rolls by local bakers.

Learning from Monitoring and Evaluation

There are two purposes to monitoring and evaluation:

- demonstrating to funders, service users, volunteers and referrers that you achieved what you set out to achieve
- learning from your practice

Kolb's Learning Cycle (below) demonstrates how we can all learn from experience.



Learning from experience takes place in small ways all the time.

Link Befriending

The Link Befriending Project found that some volunteers weren't always able to meet up with their befriender because of other commitments. So they introduced an element into the volunteer training programme, reinforcing the importance of meeting up regularly or at least informing befrienders when they weren't able to.

Apex Scotland uses ongoing feedback from employers, to adjust the level and type of support provided to people in particular work settings.

If there is only one worker in a project, s/he carries most of the information in her head and makes improvements as s/he goes along. But it might still be useful to take half a day every couple of months to analyse the evidence, try to spot patterns or areas of weakness and make any adjustments to the service. Supervision sessions can also be used to discuss changes.

In projects where there is more than one worker, team meetings can be used to review how well the project is working and plan improvements, using a simple format like the ones on pages 103 and 104.

Six monthly or annual review sessions and away days with board members, staff members and perhaps volunteers or service users are good opportunities to reflect on how the service can be improved.

Some projects employ an independent facilitator to ensure that all those involved get an opportunity to take part fully in the process.

The kind of questions you could ask at a review session include:

- Are we achieving the difference we set out to make?
- Have our activities run as planned?
- Which worked well and why?
- What didn't work and why?
- Have we had any unexpected outcomes?
- What lessons have been learned?
- What will we do differently in future?

(adapted from Children in Need: A Guide to Self-Evaluation)

How People Are Doing It Now

Projects learn from evaluation all the time, often in quite small ways, like adjusting forms or training sessions. But some projects have used more in-depth evaluation processes to contribute to organisational learning.

Befrienders Highland

Befrienders Highland ran a pilot distance befriending project over a year, which was evaluated both internally and externally. The University of Stirling interviewed service users, volunteers and referring agencies, as well as evaluating the processes the project used. The project also maintained their own monitoring and evaluation system using the self-assessment sheet on p.51 and a questionnaire.

It was assumed that, in a rural area, distance befriending might suit people who weren't able, for transport reasons, to meet face-to-face. What the project realised was not only that both befrienders and befriendees liked the service, but that they actively preferred it to meeting face-to-face.

The project recruited befrienders who would not have chosen to meet face-to-face, but were happy to undertake something, which they could do from home. Befriendees often had fluctuating levels of physical and mental health, which meant that they found face-to-face contact, difficult and preferred other forms of communication. A distance relationship gave befriendees time to think about what they wanted to say. One man said that it was the first time in years he felt able to express himself in the way he wanted.

**It's absolutely brilliant –
what you can learn**

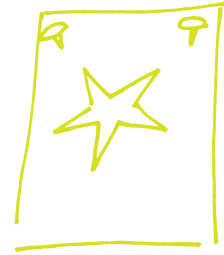
Project Manager

So the project learnt that it could look for a different kind of befriender, and that it could encourage referrers to look for people who wouldn't be confident in a face-to-face relationship. As a result of the evaluation, the project also simplified its referral process.

What do funders want?

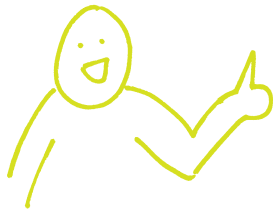
Funders say that they want the truth:

We want honesty about what happens – we are happy when people say ‘we’ve tried it but it didn’t work – it lends a degree of integrity . . . We ask them how they would do it differently next time?



They are also very keen to see evidence of organisational learning:

Projects can find it difficult to admit weaknesses or failures and there’s a risk that lessons are not incorporated into organisational learning processes.



Practical Tips

- Set up a simple, user-friendly system for storing information which is either paper-based or electronic.
- Keep it updated and backed-up.
- Pull together the evidence as you go along.
- Use your outcomes as a reference point when analysing information.
- Give yourself some regular time to do it.
- Schedule in team or board meetings every 6 months to assess how much the project is achieving and pick up any problems.

Tough Questions



- Do we have a system for collecting data?
- Is it regularly updated?
- Do we put off analysing information until we have to?
- How are we unique as a project?
- If someone asked us how we would demonstrate value for money, what would we say?
- Does anybody learn from the way we analyse information?
- Are we making changes in the project based on what we have learnt?
- How can we show we are making those changes?

Useful Resources

Learning in Regeneration (Scottish Centre for Regeneration 2006). This skills pack is targeted at managers of regeneration projects but contains useful materials on organisational learning.

The Big Picture (SCVO 1999) the quality indicators for 'Stakeholder Satisfaction' and the quality indicators for 'Positive Impact' would be useful in a review day.

The BNS Code of Practice recommends at least one member of staff for 20 matches, depending on the level of need of both befriendees and befrienders. SMN's research 'This is Mentoring' recommended between 15 and 20 matches per staff member. This ratio of staff to volunteers would need to be increased in peer mentoring/befriending projects or in projects where befriendees/mentees have a high level of need.

Barnardo's Scotland: You can talk to your Friend: An evaluation of the Volunteer Befriending Scheme of Barnardo's Scotland (2001). This report describes the evaluation process used by an independent evaluator.

With Health in Mind – Improving Health and Wellbeing in Scotland (Scottish Development Centre for Mental Health 2002) outlines the Key Protective Factors for Mental Health and Well-Being. This could be useful in demonstrating to funders, the value of befriending as an intervention in improving mental health.

Team Review Template

| What's working or not working? | What's the evidence? | Why is it working or not working? | What can we do to improve it? |
|--------------------------------|----------------------|-----------------------------------|-------------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

Team Learning Frameworks

Michael Smull, an American organisational consultant, offers a number of very simple frameworks which can be helpful for recording ongoing learning.

Model One

This model is useful for ongoing team and individual review. It is based on a learning cycle and needs to be revisited over time.

- 1 What I / we did
- 2 What I / we learned from this
- 3 How I / we could apply this learning
- 4 How I / we did apply this learning
- 5 What I / we will do differently from now on

Model Two

This model is useful for team and individual review.

- 1 What have we tried?
- 2 What have we learned?
- 3 What are we pleased about?
- 4 What are we concerned about?
- 5 What will we do now?

(based on Michael Smull's '4 Questions' model)

re:discover End of Match Report

| | | |
|---|--|----|
| Service user | | |
| Referral – CMHT / SELF | | |
| Volunteer | | |
| Initial Meeting | | |
| End Date | | |
| Number of Meetings | | |
| Reviews | 1. | 2. |
| | 3. | 4. |
| | 5. | 6. |
| Supervision | 1. | 2. |
| | 3. | 4. |
| | 5. | 6. |
| | 7. | |
| Exit questionnaire completed - volunteer | <input type="checkbox"/> Yes, please attach <input type="checkbox"/> No, please state why | |
| Exit questionnaire completed – service user | <input type="checkbox"/> Yes, please attach <input type="checkbox"/> No, please state why | |
| Significant issues? | | |

| | |
|--|--|
| <p>Summary of work: Celebrating achievements</p> | |
| <p>Outcomes</p> | |

Signed:

Date:

(Support and Development Worker)

Signed:

Date:

(Project Manager)

Reporting



This section includes:

- How to write a report
- Other formats for reporting

The first thing to consider when reporting on what the project has achieved is the intended audience.

Reporting to funders might require a totally different approach to reporting to service users, their families, the local community or the management board.

Some projects put together a collection of different materials catering for different audiences. It might be useful to write a comprehensive report, which can be adapted for different purposes.

Funders may have a format by which they want you to report. If they haven't issued you with this, it is useful to ask them what they require.

Launching a report, or a DVD, is a wonderful opportunity to bring people together to celebrate what you have achieved as a project.

We want to know about outcomes rather than outputs.

Funder

We often get report backs on head count – or they tell stories they can't write them in a systematic way. They give an activity rather than an outcome report.

Funder

Written Reports

There are lots of different ways to write a report, but below, are a list of headings to get you started.

- Your organisation and what it does
- Background to your project – with a short description of the needs or problems that you identified
- The difference you set out to make (your outcomes)
- How well you met your indicators of success (i.e. Who benefited from your project and how)
- An explanation if there are any differences between what you set out to achieve and what you achieved in reality
- Unexpected outcomes
- What lessons you learned
- How you will improve the project based on what you have learnt
- A short (2 page) summary of the main points

... and some practical tips:

- Keep it simple
- Keep it concise
- Refer back to what you set out to achieve and compare your performance to that
- Describe any additional outcomes or added value
- Include both quantitative and qualitative information
- Include diagrams, pie charts or graphs if they bring the figures alive
- Include peoples' own words whenever possible but anonymise quotes
- Describe how the project has changed on the basis of what it has learnt
- Include any future plans

A more formal report could include the following:

- Title page: title, authors' names, date
- Summary (one or two pages, with the same headings as the full report)
- Contents page (perhaps also a separate list of tables and figures)
- Acknowledgements to funders and others who have supported the project
- Glossary / list of abbreviations (if technical language is used – but try to avoid the need)
- Introduction
- Research methods – how did you collect data on the project
- Research findings
- Conclusions and recommendations – was the project successful, how might it have been improved, what lessons were learnt for next time?
- List of references
- Appendices (e.g. blank questionnaire forms; technical detail about research methods, copies of advertising, copies of local press reviews)

(taken from Dean Jo and Goodlad Robina: Supporting Community Participation. The Role and Impact of Befriending (Joseph Rowntree Foundation 1998)

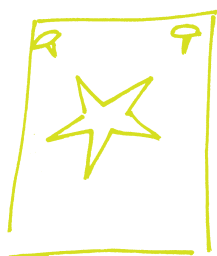
Other Formats for Reporting

There are lots of ways to convey information about what a project is doing. These can be creative and visual and involve service users and volunteers.

They could include:

- Display boards with photos and quotes
- Story boxes, where the views of service users on specific topics are captured verbatim
- Photos of graffiti walls or 'pizzas' or whatever other creative method you have used to involve people in getting their views across
- DVDs – Integr8 are involving young people in making a DVD about what people think of the service
- Performances celebrating the achievements of individuals or the project
- Poems, stories, songs and pictures

These are useful to publicise the project and to celebrate achievements. But they are additional to, rather than a replacement of, a written report.



What do funders want?

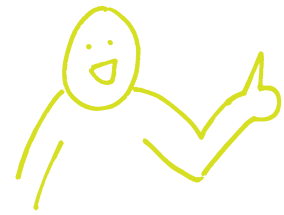
Funders are keen to stress that they want a report which refers back to what the project set out to achieve in the application form and gives a systematic analysis of progress over time. Again they are asking for the truth and for evidence, which shows that the project has learnt from both successes and failures.

We want the honest story – to know about their difficulties and how they dealt with them.

As a funder, we have made clear that to admit something did not work will not necessarily mean the end of the funding – we might well agree it makes sense to continue but along revised / modified lines.

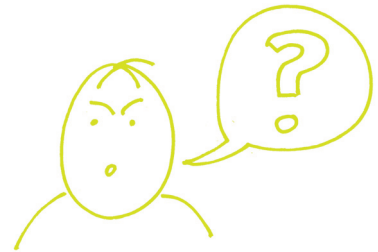
Practical Tips

- Ask funders what they are looking for in terms of a final report
- Develop different materials for different audiences
- Involve service users and volunteers in devising the materials whenever possible



Tough Questions

- Does our evaluation report describe what we set out to change and our progress in making those changes?
- Does it do so in a clear and systematic way so that it is understandable to someone who is new to the project?
- Is it written in plain English?
- Do we have other materials, catering to different audiences, giving a picture of what we do?
- Have we used the evaluation report as an opportunity to really celebrate our achievements and to learn from our practice?



References and Resources

References

Mentoring: A Guide to Effective Evaluation (National Mentoring Network, 1999). This short guide offers sample questionnaires, useful tips from practitioners and helpful templates. www.mandbf.org.uk

This is Mentoring: An Evaluation of Mentoring for Disadvantaged and Vulnerable Young People in Scotland, Summary Report (SMN, 2005). This report identifies some of the issues around evaluation and mentoring and is downloadable from: www.scottishmentoringnetwork.org.uk

The Big Picture: a framework for quality improvement in all voluntary organisations (SCVO, 1999) offers lots of useful advice and information on how to make an assessment of your organisation and its work. The 'tough questions to ask' and the 'practical ideas for quality improvement' are particularly helpful.

Supporting Community Participation: The Role and Impact of Befriending, Jo Dean and Robina Goodlad, (Joseph Rowntree Foundation, 1998) is an interesting report on the value of befriending and contains a detailed description of how the research was carried out. It is downloadable from www.culturalpolicy.arts.gla.ac.uk

A Guide to Self-Evaluation, (Children in Need, 1999) is a basic and useful guide.

You Can Talk to Your Friend: An Evaluation of the Volunteer Befriending Scheme of Barnardo's Scotland, Tish Traynor and Sarah Blackburn, (September 2001).

This report contains a very useful description of a project evaluation by independent evaluators and includes sample questionnaires and interview schedules.

LEAP for Volunteering (Scottish Community Development Centre, 2000). LEAP is a very useful planning and evaluation framework – so useful that we have included the basic process diagram in this section. It was developed by the Scottish Community Development Centre, originally for use with community education practitioners but has been adapted for a wide variety of purposes. LEAP for volunteering was developed specifically to meet the needs of the volunteering sector and is available for download from www.scdc.org.uk

Volunteer Impact Assessment Toolkit: a practical guide for measuring the impact of volunteering (Volunteering England, 2006) is useful if you really want to examine the difference volunteers make. It is available from: www.volunteering.org.uk

The Evaluation Journey (ASH Scotland, 2002) is an evaluation resource pack for community groups and contains useful information on all aspects of evaluation. It is available on their website www.ashscotland.org.uk

Save the Children publish resources on involving children in evaluations including:

- **Young People as Researchers: adaptable training exercises and handouts for workers training young people to do social research** (2000)
- **A Journey of Discovery: a practical guide to consulting with children on projects that affect their lives** (1999)
- **Participation – Spice it Up** (2001) – easy to use activity pack essential for anyone who works with children or young people .

These are available from their website:

www.savethechildren.org.uk

PQASSO is a practical quality assurance system for small voluntary sector organisations, or projects within larger organisations. It is published by the Charities Evaluation Service and available from www.ces-vol.org.uk

Catching Confidence Summary Report

The NIACE undertook some research in schools on improving confidence, which involved developing a grid to define a measure confidence. Their materials are available on www.niace.org.uk/Research/BasicSkills/Projects/Catching-confidence.htm

The Juvenile Mentoring Programme in the USA developed its own self-evaluation toolkit for mentoring projects which is available to download on: www.nwrel.org/mentoring/evaluation.html

Resources

Befriending Network Scotland is a membership organisation providing support through information, training and consultancy to befriending projects. It aims to ensure that befriending projects doing similar work throughout the country share experience and resources, learn from each other and agree on best practice.

Their website is www.befriending.co.uk

Scottish Mentoring Network is the influential body and voice for mentoring in Scotland. It is a membership organization that aims to: influence the development of mentoring in Scotland across all sectors, encourage and promote the development of a community of good practice and raise awareness about the mentoring activities of its members. The network's website www.scottishmentoringnetwork.co.uk contains details of the network's activities and a large resource bank of freely downloadable mentoring related material.

Evaluation Support Scotland provides practical advice to voluntary organisations and their funders on gathering evidence about the impact of their work and showing what difference they make. They run workshops and 1-1 support for voluntary organisations on planning, doing and learning from evaluation and they work to embed evaluation within funding and policy-making structures. Their website www.evaluationsupportscotland.org.uk includes resources and tools on evaluation.

Partners in Evaluation (www.pievaluation.co.uk), a training and consultancy agency, runs a helpful workshop on outcomes and outputs, and provides handouts, from which we took some of the definitions in this section.

www.centreforconfidence.co.uk – the Centre for Confidence and Well-being is based in Glasgow and aims to improve confidence within the population of Scotland. One of the ways it works is through the development of tools for evaluation and the Centre's website includes some interesting information and materials.

CHEX: Beyond the Anecdote is a pamphlet describing an interesting and engaging method of gathering evidence called Story Dialogue. It is available from CHEX, Suite 329, Baltic Chambers, 50 Wellington Street, Glasgow. G2 6HJ

Learning in Regeneration (Scottish Centre for Regeneration 2006). This skills pack is targeted at managers of regeneration projects but contains useful materials on organisational learning.

The Mentoring and Befriending Foundation publishes a range of resources on evaluation: www.mandbf.org.uk

Your local Council for Voluntary Sector (CVS) might be able to offer support with evaluation.

Local universities / colleges might have students looking for experience in undertaking evaluation.

Glossary

| | |
|-------------------|--|
| BNS | Befriending Network Scotland |
| ESS | Evaluation Support Scotland |
| SMN | Scottish Mentoring Network |
| Aims | statements outlining what the project is trying to do. |
| Baseline | a measurement of the situation of befriendees / mentees before they have a befriender / mentor |
| Efficiency | the ratio of resources used to outcomes achieved |
| Equity | the equality of opportunity, relative to need, to participate in and benefit from the project |
| Evaluation | to evaluate is to make a judgement about how successful you have been as a project, in making the difference you intended to the people you set out to support |
| Impact | the effect your project has on a befriender / mentee |
| Monitoring | involves gathering evidence on an ongoing basis to ensure that you are doing what you said you would do. |

| | |
|------------------------------|--|
| Objectives | statements about what the project wants to achieve by a particular date |
| Outcomes | changes which describe the impact of the project on those it sets out to benefit |
| Outputs | the activities or products of the project e.g. Training courses, events, meetings, leaflets |
| Performance Indicator | a specific measure used in a planned way to record an area of performance |
| Purpose | the difference your project ultimately hopes to make |
| Resources | what a project uses to achieve its outcomes eg. Money, staff, buildings, volunteer time |
| Sampling | selecting areas of evidence for more in-depth analysis either randomly or deliberately |
| SMART | Specific, Measurable, Achievable, Realistic, Time-limited |
| Stakeholders | all those who can claim a legitimate interest in the organisation and its work |
| Vision | what the world would look like if the project is successful. Other people describe the results of this process as mission or purpose |

Quantitative information is essentially numerical.

It answers the questions: how many? When? Where? How often? It includes records of how many people you support, their gender, age, place of residence etc. It would also include how long your waiting lists are, how many times service users meet volunteers etc. Using a self-assessment questionnaire also produces quantitative information.

Qualitative information is information which cannot be quantified such as text or spoken words. Qualitative information covers views, attitudes and experiences and is analysed by drawing out key themes from the content. It usually seeks to answer the questions Why? What and How?

Closed and Open Questions

Closed Questions have predetermined responses to choose from and permit ready quantification (56% said no, 40% said yes and 4% didn't know). Open or open-ended questions do not have an offered set of responses, but invite qualitative responses (what are the main effects on you of receiving this service?) which can then be classified, coded or summarised to produce the main patterns in respondents' views or experiences. Quotations from open-ended responses are used to illustrate patterns and themes. Questions may offer possible responses (a list of possible effects) but ask respondents to add any others they think important or to expand on their personal experience of different effects.

