



Beth Johnson  
FOUNDATION  
*looking at ageing in new ways*

# Evaluating Intergenerational Projects: A Practical Guide to Useful Resources

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# **Evaluating Intergenerational Projects: A Practical Guide to Useful Resources**

## **Foreword**

This guide has been developed as a practical support for people involved in intergenerational projects. Our aim is to make evaluation resources more readily available to people and to help them see that good evaluation is about planning and thinking about why they are undertaking a project and what difference this will make.

We wish to thank the DCSF for their support in producing this overview, which we hope will contribute to more and more people telling the story of the impact their projects are having on all who take part.

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## Introduction

Evaluation has become an increasingly important aspect of project management for organisations, staff and volunteers working in the voluntary sector. This document is designed to assist those working in the intergenerational field who are seeking to evidence the impact their work makes or starting to think about this process. This document provides an overview of resource materials that offer practical support and guidance.

Selected from a review of a significant number of available evaluation resources, ten evaluation toolkits/guides are summarised below. Each resource, in reverse date order, is briefly outlined, and those sections that may be particularly helpful to IP practitioners are highlighted. Although almost all these resources are generic, the principles and practices of evaluation they promote apply as much to IP as to other types of project work.

For people who wish to consider evaluation in greater detail, we recommend the new book: *Intergenerational Programmes Evaluation* as an excellent starting point. This is available at:

<http://www.centreforip.org.uk/Libraries/Local/949/Docs/Intergenerational%20Programmes%20Evaluation.pdf>.

## Toolkits and Guides

***Prove and Improve - A Self-evaluation Resource for Voluntary and Community Organisations***, Community Evaluation Northern Ireland (CENI), October 2008. (37 pp.)

This generic guide is a practical and accessible resource. It presents a simple model of evaluation consisting of four phases (planning, collecting evidence, analysis and reporting/ using the evaluation), and offers practical advice and guidance for each phase.

IP practitioners may find the planning section (pp 13-20) particularly helpful. It recommends drawing up a plan that clearly identifies: what the project is trying to achieve, how success will be measured, what evidence is needed, and how that evidence will be collected. Different types of outcome are discussed and sound practical advice is offered on how to deal with some of the difficult issues around outcomes (p.17). There is also helpful guidance on setting appropriate indicators to measure success (pp 19-20).

The section on 'Collecting evidence: methods and tools' (pp 22-26) is also valuable. It stresses the importance of identifying what kind of evidence is needed, when it should be collected, and the methods that are appropriate to a particular project's needs. The guide outlines a range of methods and provides helpful advice for four types of approach: questionnaires, observation, case studies and creative methods (pp 24-25).

The section on 'Analysis' (pp 28-29) also provides practical support by breaking this process down into six steps (reflecting, collating, describing, interpreting, making conclusions, making recommendations) and outlining what each step involves.

'Reporting and using' (pp 32-33) offers useful guidance on different ways of reporting findings and how to structure an evaluation report. There is also advice on how to communicate findings through other means, such as writing them up in a newsletter or website, or making a CD or DVD.

The final section of the guide ('Signposting', pp 34-37) provides a list of useful websites, with links to other evaluation resources.

### **Free download**

<http://www.ceni.org/publications/ProveandImprove.pdf>

***Your project and its outcomes***, Sally Cupitt with Jean Ellis, for Charities Evaluation Services, 2007. (23 pp.)

This is a generic guide designed to help those involved in the planning, monitoring and evaluation of projects describe the project outcomes they want to achieve. It is an accessible resource, offering a step by step approach to identifying and assessing outcomes. It is also very practical, using case studies to illustrate key concepts.

Chapter 1 explains what outcomes are/are not and describes the relationship between inputs, outputs, outcomes and impact, illustrating this with a case study (p. 6). The term '*intermediate outcome*' is introduced and illustrated with another case study (p. 7). There is useful discussion of *where* outcomes occur (e.g. in relation to individuals, communities, organisations), and this is again supported by case studies. The chapter includes a brief focus on 'Numbers and outcomes' and the setting of targets (p. 9).

Chapter 2 provides useful information about identifying and assessing outcomes. For *identification*, a four-step approach is recommended: involve other people, identify aims and objectives, develop outcomes from aims, choose appropriate outcomes. For the second step (identifying aims and outcomes), the *CES planning triangle* is recommended. This consists of three sections, with the overall aim at the apex, specific aims in the centre, and objectives at the base. A completed triangle is shown to illustrate how this approach works (p.11).

For the *assessment* of outcomes, a four-step approach is again described (pp. 14-17). The focus on *how* to collect information (step three, pp. 15-16) may be particularly helpful to practitioners. It stresses the need to consider what is most appropriate to a project's particular needs and discusses the use of questionnaires, observation, interviews and keeping records/ notes. The focus on *when* to collect information (step four, p. 17) is also useful.

Chapter 3 ('Using outcome information') has practical ideas for making the most of the outcome information collected. There are also useful sections suggesting other sources of help and further reading (p. 20) and a glossary of relevant terms (p. 21).

The list of services offered by the CES (p. 22) may be useful for practitioners who would like further support or training. The list of other CES publications at the end of the guide (p. 23) includes *First Steps in Monitoring and Evaluation* (2002), a very valuable and accessible resource aimed at voluntary organisations and practitioners with little or no experience of monitoring and evaluation.

**Free downloads:**

*Your project and its outcomes* (2007).

<http://www.ces-vol.org.uk/downloads/yourprojectanditsoutcomes-139-146.pdf>

*First Steps in Monitoring and Evaluation* (2002)

<http://www.ces-vol.org.uk/downloads/firstmande-15-21.pdf>

***Paul Hamlyn Foundation Evaluation Resource Pack***, Jane Thompson, in Association with the National Institute of Adult Continuing Education (NIACE), March 2007. (85 pp. plus supplementary resources)

This toolkit is a very comprehensive, user-friendly and visually attractive resource. It covers what evaluation is and why it matters (pp 9-15), planning (pp 18-21), choosing approaches and methods (pp 27-59), dealing with evidence (pp 64-67), report writing (pp 70-73), sustainability (77-82), and the promotion and dissemination of findings (p 84-85). A glossary of terms, supplementary resource materials, and list of resources/ further reading are also provided.

The planning section (pp 18-12) is useful as it stresses the importance of deciding early on why a project is being undertaken, what specific goals are being targeted, and how practitioners will know if they have succeeded.

The section on choosing approaches and methods is particularly valuable for those who want to find out more about the different ways data can be collected or who want to experiment with new methods in intergenerational settings. With an emphasis on participatory approaches and empowering participants, the toolkit describes a wide variety of methods, from the traditional (e.g. conducting questionnaires and surveys) to more innovative and creative approaches (e.g. using blogs, webchats and photo/ video diaries). There are very practical step-by-step instructions for a number of methods; some are well illustrated through project summaries.

The focus on qualitative indicators (pp 66-67) has a particular relevance to intergenerational settings. The guide stresses the importance of identifying *appropriate* indicators to reflect different people's experience of a project and of ensuring that people (whether project staff or participants) are speaking about the same things when considering soft outcomes (such as *increasing confidence* or *raising self-esteem*).

Useful supplementary materials are provided at the back of the toolkit. These include examples of monitoring and evaluation forms that could easily be adapted for use with intergenerational projects.

**Free download:**

*PHF Evaluation Resource Pack*: <http://www.phf.org.uk/page.asp?id=11>

***Explaining the difference your project makes: A BIG guide to using an outcomes approach***, Sarah Burns and Joy MacKeith (Triangle Consulting), edited by Steve Browning, Big Lottery, October 2006. (37 pp.)

This guide outlines some of the main steps involved in planning and managing a project using an *outcomes approach*. It is primarily aimed at those who are new to this way of working and those seeking Big Lottery funding, but has relevance for project workers in a wide range of contexts, including intergenerational settings.

The guide focuses on *planning* rather than evaluation, but much of the advice on identifying and measuring outcomes is relevant to evaluation. Practitioners should find the section 'Being clear about your aim and outcomes' (pp 10-18) particularly relevant. Three aspects of the *difference* project workers want to achieve are outlined: the overall aim/ purpose, intended outcomes, and tasks/ activities that promote change (p10). The guide recommends using a *planning triangle* to show the relationship between the overall aim, placed at the apex, and tasks/ activities at the base (pp 11-13). The emphasis here on making outcomes SMART (that is, specific, measurable, achievable, realistic and time-based; pp 16-17) is also very relevant to evaluation.

Section 3 ('Measuring progress') is useful because it distinguishes between measuring two kinds of change: the progress of tasks/activities as well as progress towards planned outcomes for participants or the wider community. This section also provides useful advice on setting milestones and identifying outcome indicators (pp 21-24), and on the use of questionnaires and other methods of data collection (pp. 25-30).

There is further useful guidance in Section 4, 'Learning from your outcomes', which focuses on analysing information, reporting, and learning from the evaluation (pp 31-37).

**Free download:**

[http://www.biglotteryfund.org.uk/er\\_eval\\_explaining\\_the\\_difference\\_large.pdf](http://www.biglotteryfund.org.uk/er_eval_explaining_the_difference_large.pdf)

***Evaluating Community projects: A practical guide***, Marilyn Taylor, Derrick Purdue, Mandy Wilson and Pete Wilde, Joseph Rowntree Foundation, 2005. (11 pp)

This guide provides a brief, easy to read introduction to evaluation. It consists of two main sections: 'All about evaluation' and 'How to evaluate: a step-by-step approach'. It also provides some helpful supplementary materials that can be adapted for use with intergenerational projects.

The first section explains the reasons why evaluation is important and lists key principles, which are useful in helping practitioners focus on who/ what is involved in the process so that they can plan how the work will be carried out. The second section recommends a five-step approach: reviewing the situation (p.3), gathering evidence (pp. 4-5), analysing the evidence (p.6), making use of findings (p.6), and sharing findings (p.7).

For the first step – reviewing the situation – the guide raises five key questions that can help practitioners identify what they want to achieve and how they can measure progress (p.3). For the second step - gathering information – the guide stresses the importance of baseline assessment, setting up systems, deciding what information is needed and how to collect it. This sub-section also presents a useful ‘menu’ of methods of gathering information (p. 4).

The third step – analysing the evidence – briefly focuses on how practitioners can work out what the information collected is telling them. The guide warns against collecting too much data and suggests using the information to assess whether goals have been reached, and to highlight any achievements or problem areas (p. 6).

The fourth step – making use of what has been found out – focuses on the importance of recognising goals that have not been met and emphasises the importance of reflection and learning from evaluation findings, so that future practice can be improved (p.6).

For the fifth step – sharing findings – the guide offers some helpful advice on deciding *who* to share findings with and *why*, and considering *how* best to communicate with different audiences (p. 7).

The annexed materials provide examples of forms that can be used (or adapted) for planning evaluation and reviewing projects.

**Free download:**

<http://www.jrf.org.uk/sites/files/jrf/1859354157.pdf>

***How Do You Know That Intergenerational Practice Works? A guide to getting started on evaluating Intergenerational Practice***, Miriam Bernard and Stephen W. Ellis, Beth Johnson Foundation, May 2004. (17 pp.)

This self-evaluation guide is specific to the intergenerational field. It is not a ‘how to’ guide but is intended to act as a stimulus for groups and individuals starting to think about monitoring and evaluating their own intergenerational practice. The resource is very accessible and user friendly, and takes a very practical approach to discussing the issues around project evaluation.

Initially, discussion focuses on who the guide is for, what kinds of projects are covered by the term ‘intergenerational practice’, and what ‘evaluation’ means (pp. 2-3). The resource stresses that there is no *single* correct approach to evaluation and provides an extensive list of the different ways that evidence can be collected (p. 3). The section on the *evaluation process* (pp. 4-5) addresses common concerns that practitioners may have, while under ‘Thinking about evaluation’ (pp. 5-6) the guide urges a practical and systematic approach.

The guide includes useful discussion of *why* evaluation is important for IP organisations and practitioners (pp. 6-7), *what* is being evaluated (pp 8-9), *who* wants

the evaluation (p. 9), and *who* does it (p.10). There is also a valuable section outlining the ethical issues involved in intergenerational project work (pp. 10-11).

The 'Getting Started' table (p. 12) is especially helpful, with its structured and detailed focus on four phases of evaluation: planning, collecting evidence, analysis and interpretation, reporting, reflecting and forward planning. Each phase is presented with a list of key questions and issues that practitioners need to consider in order to take the evaluation process forward.

The guide includes a useful glossary of terms relevant to evaluation in IP settings (pp. 14-15) and provides details of a range of further reading materials and resources (p. 17).

**Free download:**

<http://www.centreforip.org.uk/Libraries/Local/949/Docs/How%20do%20you%20know%20that%20inter%20.pdf>

***Volunteering Impact Assessment Toolkit: a practical guide for measuring the impact of volunteering***, Institute for Volunteering Research, December 2004. (126 pp. plus CD)

This is a comprehensive generic toolkit which presents accessible guidance on how to carry out impact assessment using a set of 'tried and tested' instruments and methods. Assessment focuses on four main types of stakeholder: volunteers, organisations, service users/ participants, and the wider community. The guide supplies core questionnaires and supplementary questionnaires, which can be used to assess five kinds of 'capital': physical, human, economic, social and cultural, for each type of stakeholder.

This toolkit is of practical use to IP practitioners, who can select and customise materials to meet their particular needs. The questionnaires may be especially useful, particularly those designed for volunteers (pp 41-51), staff (pp 61-71 and 'core users' (pp 79-90). These materials can easily be adapted to suit particular projects, participants and settings. There are also useful topic guides to support practitioners running focus groups for volunteers (p53-55) and community representatives (pp 105-108). The pro-forma for a 'Volunteer Diary' is also a helpful resource and could be adapted for use with other stakeholders and in intergenerational settings.

Price: £35.00 + £ 2.25 p&p for UK orders. (VE Members - 20% discount.)

**To order**, follow links at:

<https://ecommerce.volunteering.org.uk/PublicationDetails.aspx?ProductID=V309>

***The Evaluation Journey: An Evaluation Resource for Community Groups***, Linda McKie, Joy Barlow and Paula Gaunt-Richardson, Action on Smoking and Health (ASH) Scotland, 2002. (104 pp.)

This information pack, written in an accessible style, offers practical and systematic guidance on monitoring and evaluation. It has a very user-friendly format, with coloured dividers separating the sections and liberal cross-referencing within the guide. This helps readers to quickly and easily locate the information they need. It also encourages practitioners to revisit sections and reconsider various aspects of the 'evaluation journey' as they move forward.

The guide has a particularly helpful section on evaluation planning (pp. 15-21), which highlights many of the key questions practitioners need to consider. In particular the 'summary checklist' of questions (p. 19) is very useful, especially as each question is linked to another (page-referenced) part of the guide. A sample plan for a 12-month project is also provided (p. 21).

The section on 'How to collect information' (pp. 25-56) is very helpful as it presents a wide range of methods of collecting information (project records, photographs, video, collages, creative writing/art work, diaries, interviews, focus groups, case studies, questionnaires). Each method is described in some detail and its 'positive points and possible problems' are discussed. Each method (apart from interviews) is well illustrated with an authentic example ('a snapshot from a previous journey').

The pack includes a comprehensive glossary of terms (pp. 77- 84) and has a useful section on 'Evaluation questions' (pp. 85-89), which can help practitioners reflect on various aspects of project planning and management, including: the initial proposal, participants, funding, monitoring and outcomes. A reference list of useful groups and publications is also provided at the end of the guide (p. 104).

**Free download** (as four pdf files):

[http://www.ashscotland.org.uk/ash/3367.html#Evaluation\\_Journey](http://www.ashscotland.org.uk/ash/3367.html#Evaluation_Journey)

***A Little Book of Evaluation***, Connexions, October 2001. (36 pages)

Originally designed to provide support for Connexions project managers in Lincolnshire, this accessible guide is useful for practitioners in a much wider range of contexts. It may be especially helpful to those developing an evaluation strategy for the first time.

Chapter 1 stresses the importance of using 'evidence-based practice' to identify what works best, so that future policies and practices can be improved (pp. 5-6). The term 'evaluation' and what the process involves are discussed, and a useful distinction made between monitoring and evaluation. The guide urges practitioners to take 'a pragmatic and informed approach to evaluation' (pp. 7-9). Case studies are used as examples of evidence-based practice (p. 6) and a pragmatic approach (p.9).

The first part of Chapter 2 ('Getting Started', pp. 10-13) provides a useful evaluation framework with six main components. Each is briefly outlined and practical examples

are given for the first two: 'Key feature' (broad aim and objectives) and 'Rationale'. For the third component, 'Process', the guide stresses the need to select the most appropriate method(s) of data collection, and distinguishes between quantitative and qualitative methods (p12). It also gives valuable guidance on 'Inputs' (in particular, assigning clear roles and responsibilities to key stakeholders), 'Indicators of success', and 'Reporting and dissemination'. The rest of the chapter (pp. 13-14) focuses on crucial issues related to 'Ethics and Values' and 'Reliability, Validity and Accuracy'.

IP practitioners may find the section on 'Useful Research Methods' in Chapter 3 particularly helpful. In particular, there is detailed discussion of some key issues related to the design and piloting of questionnaires (pp. 18-21). There is also valuable guidance on using unstructured and semi-structured interviewing techniques (pp. 21-22) and conducting focus group discussions (pp.23-25); the advantages and disadvantages of these approaches are highlighted. This chapter also provides useful information on sampling (p.13) and the use of quantitative and qualitative approaches (pp.16-18).

Chapter 5 ('Making it work', pp. 28-29) provides a practical guide to assessing whether evaluation is effective. The section on 'Preparation' (p28) presents ten 'top' questions, based on the evaluation principles discussed in the guide. Answering questions such as 'What research or baseline information already exists?' and 'What are the key indicators of success?' *before* or *during* the course of a project will help practitioners judge whether their evaluation is likely to be effective. The section on 'Reflection' (p. 29) helps practitioners focus on key questions such as 'Were all the aims and objectives met? If not, why not?' *after* a project has finished.

This guide also provides a useful reference list and bibliography with recommended further reading (pp. 33-34).

**Free download:**

[http://www.derby.ac.uk/files/icegs\\_a\\_little\\_book\\_of\\_evaluation2001.pdf](http://www.derby.ac.uk/files/icegs_a_little_book_of_evaluation2001.pdf)

***Evaluation Toolkit for Projects***, ECOTEC Research & Consulting Ltd., (undated).

This is a fairly comprehensive generic toolkit, principally targeting project managers, staff and volunteers involved in projects funded by the Big Lottery Fund's '*Reaching Community*' programmes in England and N. Ireland.

The section on evaluation methods (pp 7-10) provides good practical advice on ways of collecting quantitative and qualitative data. There is a helpful section on how to design surveys to collect quantitative data, including a table of the benefits and 'things to be aware of' when carrying out different types of survey: telephone, postal, face-to-face (pp 7-8). The toolkit outlines a wider range of qualitative methods, including in-depth interviews, focus groups, and diaries, and again provides a useful table showing the benefits and potential drawbacks of different methods (pp 8-10).

The 'Further Support' section (p. 14) recommends a range of other evaluation resources, including the Big Lottery Fund publication *Explaining the Difference* (outlined above, p. 4). It also recommends the '*Reaching Communities*' website,

<http://www.reachingcommunities.org/links.aspx> , which provides links to many other helpful resources.

**Free download:**

[http://www.reachingcommunities.org/Downloads/toolkit\\_entire.pdf](http://www.reachingcommunities.org/Downloads/toolkit_entire.pdf)

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