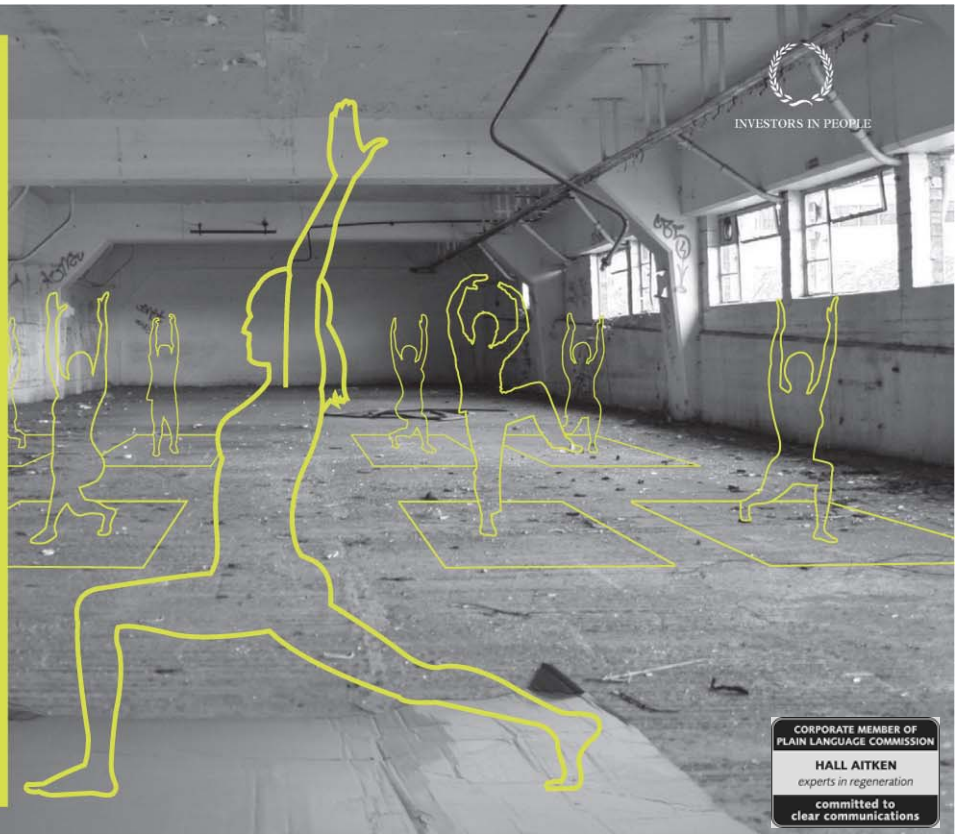


Health and Wellbeing



hallaitken
experts in health and wellbeing



Way of Life Programme

Monitoring and Evaluation Guide for projects

May 2008



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How to use this guide

This guide makes up one part of the Way of Life monitoring and evaluation support for projects. Other available support is outlined below.

The guide has three sections:

Part 1: 'Monitoring and evaluation basics' gives you all the information you will need to start monitoring and evaluating your programme. It sets out the five key steps to monitoring and evaluation:

- Step one: develop progress indicators
- Step two: develop a monitoring framework
- Step three: establish a baseline
- Step four: collect and use monitoring data
- Step Five: self-evaluation

Part 2: 'Progress indicators' gives you a summary of a menu of the progress indicators for this programme and details of each indicator.

Part 3: 'Advanced information' tells you about activities which can help you monitor and evaluate your project successfully. It also provides advice on participation, working with children, feedback, dissemination and sources of further information.

Other support

Each year you can expect the following support from Hall Aitken:

- Three days of dedicated support provided to your project – by telephone, email or in person;
- A set of workshops;
- An annual conference;
- Telephone and email support via a dedicated helpline; and
- A website with useful information and techniques.

Each project will have a designated case manager and you can contact him or her at any time. Hall Aitken will advise you of the name and contact details for case managers. However, you can also contact Hall Aitken using the following email address and telephone number:

wol@hallaitken.co.uk or 0141 225 5512

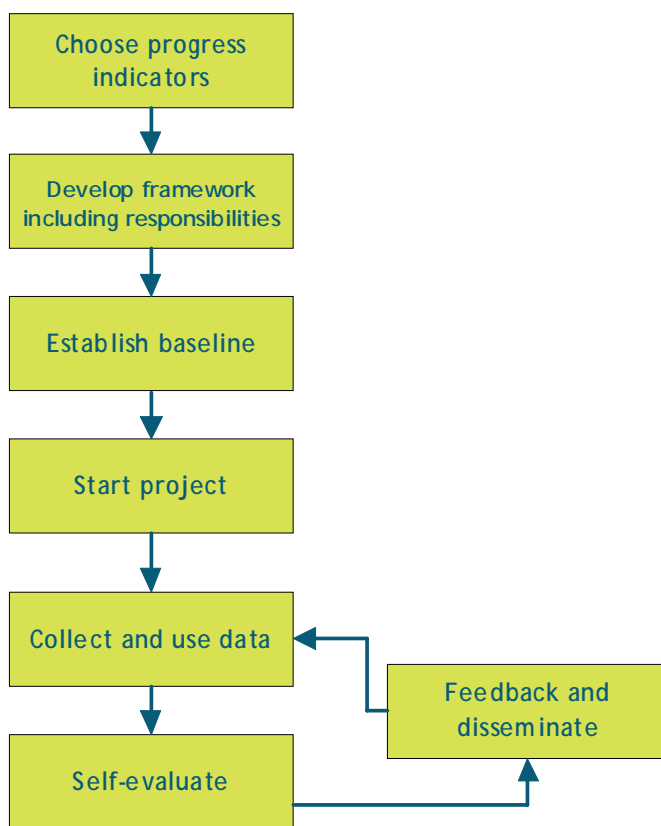
As part of the evaluation of the Way of Life Programme, you may also be expected to take part in other activities such as:

- Surveys;
- Workshops and conferences, including presenting about your project;
- Developing case studies;
- Submitting mid-year, and end of year progress reports (see samples on the website); and
- Help provide further information to the BIG Lottery Fund where it helps with the analysis and interpretation of the Way of Life Programme.

Part 1: monitoring & evaluation overview

This section explains the value of monitoring and evaluation for Way of Life and other programmes. It sets out a clear process and describes each step in Plain English. Figure 1 summarises the steps covered in this section.

Figure 1 the monitoring and evaluation process



The Way of Life programme

Background to Way of Life

The Way of Life programme fits with, and contributes to, many key objectives set out by the Welsh Assembly Government and its partners. Key strategies include:

- Food and Fitness – 5-year implementation plan (2006);
- Health Challenge Wales (2004);
- Climbing Higher (2005); and
- Play in Wales – Play policy implementation plan (2006).

The programme also complements existing initiatives working throughout communities in Wales. You will have shown in your application how your project complements and adds value to existing services and activities.

The outcomes BIG wants to achieve with Way of Life

The Big Lottery Fund is responsible for giving out half of the money the National Lottery raises for good causes. It wants to use the money to make big, positive changes for communities, through the fair and open funding of people, projects and programmes, with a particular emphasis on tackling need.

The Way of Life programme is one of two programmes under the Healthy Families initiative in Wales. It is a strategic programme to promote healthy and active lifestyles among children and families by creating a joined up approach to children's play, healthy eating and physical activity. Way of Life has three programme outcomes:

- Increased awareness of healthy eating and exercise among children and families.
- Positive changes in attitude and behaviour towards healthy eating and exercise among children and families.
- Strategic links developed to promote a joined up approach to nutrition, physical activity and play.

The main beneficiaries are children under 12 years old living in Wales, but other family members can also benefit from taking part in the programme.

Why BIG wants you to monitor and self-evaluate

As a public funder, BIG will have to show how the money given to Way of Life projects has made a difference to target groups and achieved the programme outcomes.

At the same time all the experience BIG has gained in funding other programmes shows the best projects are those that keep a close track of what they are achieving and learn from their experience. So this guide shows you how to use monitoring and evaluation techniques to deliver the best possible project – and to help BIG show how it's funding is making a difference.

Monitoring and evaluation principles

What is monitoring and evaluation?

Monitoring means collecting progress data or management information regularly and methodically. Monitoring data should help with both management and evaluation.

Evaluation means assessing the longer term impact of a programme or project and identifying lessons for the future. Evaluation helps your project to develop and helps BIG to learn for future programmes.

Why evaluate and monitor?

Often organisations monitor and evaluate because a funder has asked them to. But evaluation has many benefits. Evaluation will allow you to:

- Identify what worked well and what did not;
- Compare and share learning between projects;
- Help build community capacity;
- Help to plan current and future projects;
- Build on good practice – and avoid repeating mistakes; and
- Assess the extent to which your project has been a good use of public funds.

What resources and skills will you need?

You or your staff must know who is collecting the information, how, and when it will be collected. Anyone working on monitoring and evaluation must have a basic understanding of research methods and data analysis, and have the skills to interpret and report on this information in a clear and useful manner. Think about the following questions:

- Do you have a sufficient budget for monitoring and evaluating?
- Have you earmarked staff time for monitoring and evaluating?
- Do you have sufficient IT capability if you plan to use IT based-approaches?
- If you are going to use certain tools and techniques can you get hold of them easily? And will any equipment withstand frequent use?
- How will you use the data? and
- Who will be responsible for analysing the data and reporting back to BIG?

How should you monitor and evaluate?

In the Way of Life programme you should monitor and evaluate your work with children under 12 years old, their families, the wider community; and organisations delivering relevant services. The next pages set out how to do this in five steps:

- Step one: develop progress indicators;
- Step two: develop a monitoring framework and tools;
- Step three: establish your baseline;
- Step four: collect and use data; and
- Step five: self-evaluation.

Step one: choose progress indicators

Progress indicators are measurements that help you check progress towards your outcomes. Some indicators are clearly linked to what they measure and are quite objective, such as weight. Others suggest (or indicate) progress but are less objective such as responses to a questionnaire about feelings of confidence.

BIG is an outcomes funder and asked you in your application to show how your activities would lead to your ultimate project aim as in Figure 2 opposite. The indicators you choose should show if and how you are progressing towards your outcomes. So you need to develop a set of indicators that echo the logical flow from activities to outcomes that you set out in your application to BIG and to any other partners.

There will often be a series of steps towards your ultimate outcomes. In this guide we have called these intermediate steps short-term outcomes. It will often be helpful to have indicators for some of these steps so you can see how you are making progress towards your eventual outcomes.

Figure 2 the BIG/CES planning triangle

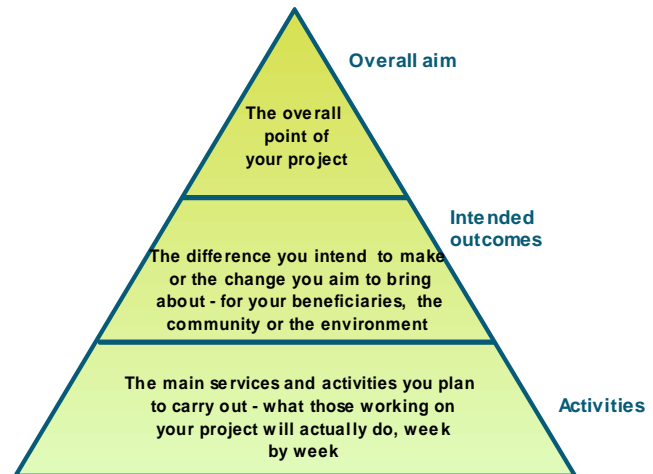


Figure 3 Steps from need to eventual outcome

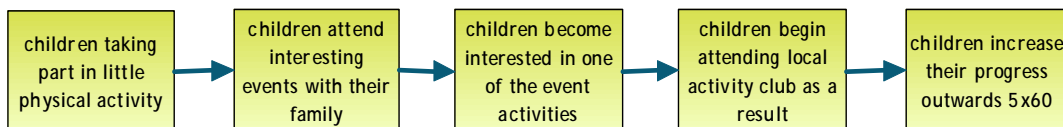


Figure 3 above shows an example of steps in a programme. Devising a way of measuring progress at each stage would give you a set of indicators.

Once you have developed a set of draft indicators you can check they are useful with this simple checklist:

Figure 4 - Indicator checklist

Indicator quality checklist	
Can I measure this?	✓
Can I measure this often enough to be useful?	✓
Will it provide clear information on progress towards my outcomes?	✓
Will it be reasonably accurate (and do I know the limitations)?	✓
Do I have enough time and money to use this properly?	✓

Indicators menu

For the Way of Life programme we have provided you with a menu of relatively simple progress indicators that:

- Will help you manage your project;
- Offer comparable information across all projects;
- Link to Way of Life programme outcomes; and
- Link to a series of data collection tools.

We have provided you with a menu of 16 progress indicators to choose from. Each progress indicator is presented in a table such as the one in Figure below. The top line tells you the name of the indicator. The top line also tells you what kind of indicator this is. Finance is an 'Input' indicator.

- The 'Explanation' tells you exactly what the indicator is.
- The 'Breakdown category' tells you what information you should gather.
- 'How to measure' lists ways to collect the information you need
- 'Collection' tells you how often you should collect the data.
- 'Report' tells you how often you will need to report the information

Figure 5 Example progress indicator

Name/Type	Finance	Input									
Explanation	<p>This Progress Indicator measures the financial and financial equivalent resources going into the project.</p> <p>Count funding from BIG and other sources. Funding from other sources is match funding. This can either be financial support or in-kind contributions with a financial value. Count staff under revenue funding.</p>										
Breakdown categories	<p>Present your results in a table like this:</p> <table border="1"> <thead> <tr> <th></th> <th>BIG</th> <th>Match funding</th> </tr> </thead> <tbody> <tr> <td>Capital</td> <td></td> <td></td> </tr> <tr> <td>Revenue</td> <td></td> <td></td> </tr> </tbody> </table>			BIG	Match funding	Capital			Revenue		
	BIG	Match funding									
Capital											
Revenue											
How to measure	Accounts; management records										
Collection	On-going	Report Annually									

You can find all the progress indicators and a summary table in Part 2 of this guide.

Value Mapping

A web based tool called Value Mapping will enable you to record your monitoring data so that it can contribute to the overall programme monitoring and evaluation. There will be training and guidance available to help you with this.

Different types of indicators and measures

Each menu indicator contains suggestions for both qualitative and quantitative methods. Consider which is most suitable for your project – this will usually mean a mix of qualitative and quantitative information. You may also wish to consider whether to gather information for only a sample of beneficiaries.

Quantitative data

Quantitative, or ‘hard’ data uses numerical or units of measurement. For example, the height of an individual can be measured, quantitatively, in centimetres or metres. Quantitative methods can provide reliable measurements and comparisons which can be summarised easily. These methods can be straightforward to repeat, for example by counting the numbers attending an event. However, they do not always offer in-depth information or respond to individual circumstances.

Quantitative data could include, for example:

- How often children in your project meet the 60 minute moderate intensity physical activity on most days each week target for physical activity, and the change over time;
- The average number of hours each volunteer works a week for your project; or
- The proportion of parents who reach the ‘eatwell plate’ target when making meals for their family.

Qualitative data or ‘soft’ data

Quantitative or ‘hard’ data will only show you part of what is happening in your project. You will also need to collect qualitative or ‘soft’ information and indicators, although this is often more difficult. It includes:

- Changes in confidence, attitude or motivation;
- Feelings – of well-being, safety or satisfaction;
- Personal skills – these include problem solving and social skills; and
- Social cohesion or community spirit, a collective sense of place and purpose.

Often changes in feelings, skills or cohesion are more important than changes collected by ‘hard’ indicators. For example, someone with increased confidence and motivation may take more regular and more intense exercise than someone with little confidence who might be worried about what other people at a gym think.

Qualitative data could include stories, photographs and case studies – all of which can help to explain why a change is happening (or not). This type of data will help you understand much more about how people’s attitudes and behaviour is affected by your project than simple registers or surveys.

Sampling

If you are dealing with a small number of children and families you will probably need to gather information on everyone to help you understand your progress. On the other hand if you are working with larger numbers you may be able to gather information on a smaller number and then use the results to work out what is happening for everyone else. To do this properly you need to draw on statistical sampling theory. You will need advice on how large your samples need to be to draw sound conclusions.

Step two: develop a framework and select tools

Once you have chosen your indicators, draw up a monitoring framework which shows you how to gather the information on each indicator. Figure below shows an example of a basic framework.

Figure 6 Basic monitoring framework

	Indicator	Collection Method	Frequency	Who?
Input	Finance	Accounts	Quarterly	Finance Officer
Activity	Attendance	Register	Weekly	Session co-ordinators
Outcome	Physical Activity Awareness	Self-reported questionnaire	Quarterly	Session co-ordinators

Consult with partners, stakeholders, representatives, steering committees and others and agree the monitoring framework with them. Monitoring data will not always be an exact picture of your activities. But what matters is getting useful information that can help you and others make better (but not perfect!) decisions.

Download a blank framework template from the website: www.bigwayoflife.com and use the checklist below to make sure your framework is sound.

Framework quality checklist	
Does it contain only a few indicators?	✓
Do the indicators measure progress towards your outcomes?	✓
Do you have a logical set of hard and soft indicators?	✓
Will your framework need only modest time and money?	✓
Will the framework communicate information clearly?	✓
Will the information be used to make decisions?	✓

Developing tools

Your framework will show the indicators you have chosen, but you will also need to choose the best tools to collect this information. Data for some indicators can only be gathered in one way, but for others choosing the best tool to suit your project will be an important part of finalising the framework.

You may be able to use existing sources of information for some indicators. Often surveys of some type will be appropriate. In addition for some indicators you may be able to use photographs, pictures, recordings, text messages, computers...and so on. More information can be found in our 'Tools and Techniques' document or by logging on to: www.bigwayoflife.com. Your consultant will help you choose indicators and tools best suited to monitor your project.

Step three: establish your baseline

A baseline is the position as measured by your indicators when your project starts. Establishing your baseline at the start of your project – or the baseline for individuals when you first come into contact – means that you can track changes over time.

You can collect baseline context data from existing sources– for example, population statistics and national survey data. This provides the baseline position for your area. By reviewing changes in this over time you can establish how and if your project is affecting the wider community (see the later section on evaluation and additionality). Unfortunately much of this data appears after a long delay and it often covers an area much larger than your project. As a result it may be of only limited use.

You will also need baseline information for each of the indicators you have for your project. People often become confused by the term ‘baseline’ so it may be better to think of your ‘starting point’. Here are some examples:

- The number of people attending an existing club, collected by a questionnaire to clubs;
- The mean average awareness of physical activity guidelines of children and families before they join your project, collected by interview with each new participant;
- The level of 5x60 activity in the local community from a local survey.

For many of your indicators your baseline will be zero, for example the number of participants in a new service must be zero as the project starts.

You can find an example of how a baseline can be used to monitor change in BIG’s School Fruit and Vegetable Scheme evaluation documents which can be found at: http://www.biglotteryfund.org.uk/er_eval_schoolfruit_research_summary_eng.pdf

When you have established your baseline you can also set targets – you may need to review any you have already set to make sure they are both realistic but stretching and worthwhile. Figure 7 below shows an example of an extended monitoring framework (based on the simple one shown in Figure) with baselines and targets added.

Figure 7 Monitoring framework showing baseline and targets

Indicator	Collection Method	Frequency	Who?	Baseline figures	Targets		Date																																				
					Figures																																						
Input	Finance	Accounts	Quarterly	Finance Officer	Not applicable		Nov 2009																																				
					Capital	£5,500		Match funding £25,000																																			
					Revenue	£300,000	£50,000																																				
Activity	Attendance	Register	Weekly	Session co-ordinators	<table border="1"> <thead> <tr> <th>Class</th> <th>Number of classes</th> <th>Numbers in class</th> </tr> </thead> <tbody> <tr> <td>Indian Dance</td> <td>1</td> <td>17</td> </tr> <tr> <td>Pilates</td> <td>1</td> <td>9</td> </tr> <tr> <td>Yoga</td> <td>2</td> <td>18</td> </tr> <tr> <td>Spinning</td> <td>1</td> <td>15</td> </tr> <tr> <td>Total</td> <td>5</td> <td>77</td> </tr> </tbody> </table>	Class	Number of classes	Numbers in class	Indian Dance	1	17	Pilates	1	9	Yoga	2	18	Spinning	1	15	Total	5	77	<table border="1"> <thead> <tr> <th>Class</th> <th>Number of classes</th> <th>Numbers in class</th> </tr> </thead> <tbody> <tr> <td>Indian Dance</td> <td>2</td> <td>15</td> </tr> <tr> <td>Pilates</td> <td>2</td> <td>8</td> </tr> <tr> <td>Yoga</td> <td>3</td> <td>10</td> </tr> <tr> <td>Spinning</td> <td>3</td> <td>12</td> </tr> <tr> <td>Total</td> <td>10</td> <td>112</td> </tr> </tbody> </table>	Class	Number of classes	Numbers in class	Indian Dance	2	15	Pilates	2	8	Yoga	3	10	Spinning	3	12	Total	10	112	May 2009
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Total	10	112																																									
Outcome	Physical Activity Awareness	Self-reported questionnaire	Quarterly	Session co-ordinators	No. of regular attendees (at least 3 sessions out of 4) = 77 No. of responses to baseline questionnaire= 48 No. respondents aware of physical activity guidelines = 19 (39.5%)	To increase awareness of physical activity guidelines to 78 regular attendees (70%) over 12 week session.	End of each 12 week session																																				

Step four: collect and use data

Collecting monitoring data is only part of the job: analysing and responding to your findings is essential.

Project review meetings

Set up regular meetings to review what your monitoring data is telling you. These are best as part of existing regular management meetings, but you could set up separate meetings. Meet regularly - perhaps once a month or once a quarter.

Analyse trends

Sometimes one set of monitoring data will give you useful information. For example, if the numbers of people using a service are well short of your target you may want to make changes such as amending recruitment strategies or changing opening hours. Often you will learn more by looking at *changes* in monitoring data over time. Use other information and opinion to work out the reason for any trends and identify any action you need to take as a result. Ask, "So what is the information telling us?"

Compare data sets

The *most* useful information usually comes from *comparing* the progress and trends of different indicators. For example:

- Did spending more on each person lead to better results?
- Do more events result in more participants, or does the total stay constant?

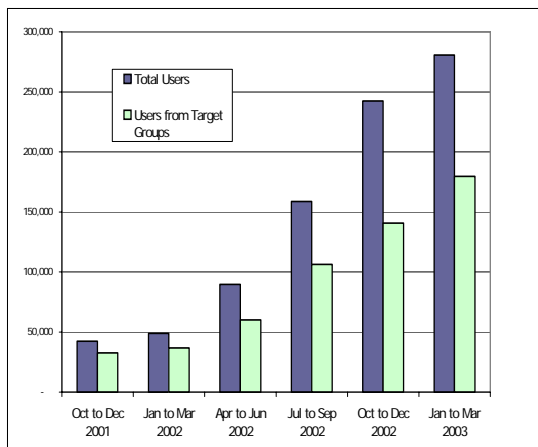
Sometimes you will need to look at information that you do not collect directly to explain your data. For example:

- Is an increase in the number of sessions because of your project or because the local leisure centre offered free sessions in June?
- Is an increase in activity levels locally simply in line with regional trends?

Decide on action

Once you have reviewed the data, you can decide if you need to change anything you are doing. Often the monitoring data itself will not be enough to show exactly what is happening – but if it helps highlight key questions it will be worthwhile.

Figure 8 Example of monitoring data analysis



This graph shows the number of users of sports centres for each quarter for eighteen months. The second bars for each quarter shows how many were in the target groups. Although number of users increased, the proportion of those in the target groups decreased. This is at least reason to consider if any action +is needed.

Step five: evaluation

Evaluation involves taking a step back from a project to review what it is really achieving – and how it is doing this. It makes use of monitoring and other data to answer these questions and draw conclusions about future action. For the Way of Life it would be reasonable to do this on an annual basis.

There are two types of evaluation:

Formative evaluation improves and develops a project or programme as it progresses. It asks the question: *is the project or programme working well and could you improve it?*

Summative evaluation assesses how well a project or programme met its objectives once it is complete, and feeds into future policy development. It asks the question: *has the project made any long-term difference or would the money have been better spent elsewhere?*

Self evaluation tends to concentrate on the first question and this should be the focus for your work. But by linking with other projects, using some common monitoring tools and working with Hall Aitken it will also be possible to maximise the value of your evaluation for any summative evaluation BIG commissions.

The key questions for any evaluation are:

- Is the project still relevant to local needs?
- How well are you managing and using resources?
- How effective is your project at achieving its intended outcomes?

Effectiveness and additionality

Probably the most difficult part of evaluation is looking at effectiveness or *additionality*. This is a key evaluation concept and involves considering what outcome has been delivered because of a specific intervention *that would otherwise not have happened*.

Measuring effectiveness usually involves reference to the baseline for the key project goals. Then a good evaluation identifies what would have happened without the intervention. The net difference between this and the observed outcome provides a measure of *net additional impacts* – or additionality.

Measuring additional benefit involves taking account of:

deadweight – the extent to which activity would have occurred regardless of the intervention concerned;

displacement – the extent to which activity may have displaced activity from elsewhere; and

double-counting – where outputs are attributable to more than one project.

This requires careful thought and you may not be able to answer these questions with sound data. But considering them, perhaps on an annual basis, can help you focus your project more clearly.

An evaluation process

There is no one correct way to evaluate your project, but the following process sets out key questions that you can use as the basis for your evaluation. One way of

doing this would be to set aside a day or half day every six months to answer these questions and then write your answers into a short report. This can be used to provide evidence to BIG about the progress of your project. You may need to give someone the task of gathering data and analysis in advance of the meeting. It may also be useful to involve partners and users in the review.

<p>Is the project still relevant to local needs?</p>	<p>Has the population changed and does this affect the need for your project?</p> <p>Are there other services now offering similar services or have other services reduced?</p> <p>Have you met the need so it no longer exists?</p> <p>Was your original assessment of need accurate?</p>
<p>How well are you managing and using resources?</p>	<p>What quantity and service level have you delivered?</p> <p>What has this cost for each person or other unit (for example for each session or event)?</p> <p>How does this compare with other similar services?</p> <p>What has worked and what has not?</p>
<p>How effective is your project at achieving its intended outcomes?</p>	<p>How far have you met your outcome targets according to your records?</p> <p>Can external stakeholders such as partners and the local community see this change?</p> <p>What other changes in the local environment or other services might have affected your outcomes?</p> <p>What would have happened for your target group if the project had not been operating?</p> <p>Overall what difference have you made and how robust is your evidence for this?</p>

Draw on the widest possible sources for this annual review – within the restrictions of time and resources available. Sources could include:

- Your monitoring records
- Discussions with staff, volunteers and beneficiaries
- Discussions with partners and other stakeholders
- Local community surveys and consultations with other community groups
- Data from National Statistics web site, your HSCWB partnership and Council

Feedback and dissemination

Feedback and dissemination are important parts of any project. A written report may be suitable for stakeholders but consider innovative ways to let your staff, participants and the community hear about the project. You could use websites, the local radio, demonstrations of skills in schools, mother and baby groups, at a supermarket. You will need to include your plans in your project business plan.

Reporting your findings to BIG

In addition to recording your progress indicator data using Value Mapping (see page 7) you will be required to submit mid-year and end-of-year progress reports throughout the life of your project.

Reports provide an opportunity for projects to update BIG on progress towards achieving outcomes, in addition to income and expenditure during the reporting period. Progress indicator data should be used to support your answers to the key questions in Section 2 of the report template. A sample copy of the report templates can be found on the www.bigwayoflife.com website.

Some projects will also be subject to additional calls from Grants Officers in between reporting periods.

Part 2: progress indicators

This section sets out the menu of indicators for Way of Life and provides detail on how to use each one.

Summary

Figure 9 below gives an overview of all the Progress Indicators for the programme by indicator type – input, activity, short-term and long-term outcome.

Figure 9 – Summary of Way of Life progress indicators

Type	Mandatory/ Optional	Name	What it measures
Input	Mandatory	Finance	Funding for the project broken down by BIG and match funds
Input	Optional	Volunteer staff	Hours of volunteer time
Activity	Optional	Project participant numbers	Number of people in project – count each person once
Activity	Optional	Attendance/Visits	Total number of attendances
Activity	Optional	Hours of delivery	Staff (including volunteers) contact time
Short-term Outcome	Optional	Completers (HHT/HF)	Number of beneficiaries completing target number of sessions
Short-term Outcome	Optional	New participants	Number of new participants joining existing local activities (sports clubs etc...)
Short-term Outcome	Optional	Healthy Friends	Number of Healthy Friends still active after 12 weeks (For Healthy Friends Model)
Short-term Outcome	Optional	Satisfaction	Level of satisfaction in programme reported by participants
Outcome	Mandatory	Nutrition awareness	Change in nutrition awareness
Outcome	Mandatory	Nutrition attitude	Change in nutrition attitude
Outcome	Mandatory	Nutrition behaviour	Change in nutrition behaviour
Outcome	Mandatory	Physical activity awareness	Change in physical activity awareness
Outcome	Mandatory	Physical activity attitude	Change in physical activity attitude
Outcome	Mandatory	Physical activity behaviour	Change in physical activity level
Outcome	Optional	Partnership strength	Strength of partnership links

Standard breakdown categories

Each indicator is divided into separate categories which provide further information about the nature of the indicator. These are the 'breakdown categories'. These will help you collect the monitoring data. Analysis of these categories will help you understand how change takes place. We have provided you with breakdown categories across four themes: population; physical activity; nutrition; and partnership.


Population

Category	Breakdown
Age	0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years); 12-16 years; 16-45 years; over 45 years
Sex	Male/Female
BME	Yes/No
Disability	Yes/No
Living in area of deprivation	Yes/No Postcode

Physical activity

Category	Breakdown
Children (60 minutes of physical activity a day)	<ul style="list-style-type: none"> <input type="radio"/> Once a week <input type="radio"/> Twice a week <input type="radio"/> Three times a week <input type="radio"/> Four times a week <input type="radio"/> Five or more times a week
Adults (30 minutes of physical activity a day)	<ul style="list-style-type: none"> <input type="radio"/> Once a week <input type="radio"/> Twice a week <input type="radio"/> Three times a week <input type="radio"/> Four times a week <input type="radio"/> Five or more times a week

Nutrition

Category	Breakdown
Awareness of, attitude towards, and consumption of, the 'eatwell' plate	

Partnership

Category	Breakdown
Existing partners	Statutory sector Voluntary sector Private sector Play sector
New Partners	Statutory sector Voluntary sector Private sector Play sector

Progress indicators details

As well as the information contained in this section you should also be aware that:

- Final outcome measures can often be used as short term outcome measures too; and
- Behaviour, awareness and attitude measures can be collected using the same tool. This will reduce your workload and avoid participant fatigue.

Name/Type	Finance	Input										
Definition/ Explanation	<p>The financial and financial equivalent resources used to fund the project.</p> <p>Count funding from BIG and other sources. Funding from other sources is matched funding. This can either be financial support or in-kind contributions with a financial value such as computers donated by a local company. Count staff under revenue funding.</p>											
Breakdown categories	<p>Present your results in a table like this:</p> <table border="1" data-bbox="512 954 1027 1151"> <thead> <tr> <th></th> <th>BIG</th> <th>Match funding</th> </tr> </thead> <tbody> <tr> <td>Capital</td> <td></td> <td></td> </tr> <tr> <td>Revenue</td> <td></td> <td></td> </tr> </tbody> </table>				BIG	Match funding	Capital			Revenue		
	BIG	Match funding										
Capital												
Revenue												
How to measure	Accounts; management records											
Collect	On-going	Report	Annually									

Name/Type	Volunteer staff	Input	
Definition/ Explanation	<p>Count the hours of volunteer time used to deliver your project. Suitable for projects largely reliant on volunteers to deliver activities.</p>		
Breakdown categories	See standard breakdown categories		
How to measure	Project database/ volunteer records/ time sheets		
Collection	Monthly	Reporting	Quarterly

Name/Type	Participants	Activity	
Definition/ Explanation	The total number of people participating in the project. Count each person only once. Count all those attending project activities.		
Breakdown categories	Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Secondary beneficiaries – see standard breakdown categories		
How to measure	Registration forms, footfall counters, photographs, consent forms		
Collection	Weekly	Reporting	Quarterly

Name/Type	Attendance	Activity	
Definition/ Explanation	The total number of attendances/visits to project activities during your project. Example: Count a person who attends three sessions or events delivered under your project three times. Where a second person is involved in one activity each week over a month, count them four times. Together they add 7 counts towards this Progress Indicator.		
Breakdown categories	Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Secondary beneficiaries – see standard breakdown categories		
How to measure	Register counts, attendance counts, user surveys		
Collection	Weekly	Reporting	Quarterly

Name/Type	Hours of delivery	Activity	
Definition/ Explanation	The number of hours project staff deliver activities to groups of different sizes as part of the project. Count all hours spent on project delivery.		
Breakdown categories	The breakdown categories are by the size of groups sessions are delivered to: 1 – 4 people 5 – 10 people 11 – 30 people Over 30 people		
How to measure	Staff time sheets		
Collection	On-gong	Reporting	Quarterly

Name/Type	Programme completers	Short-term outcome	
Definition/ Explanation	The number of beneficiaries who have completed a set of sessions. Count each programme completer only once.		
Breakdown categories	Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Secondary beneficiaries– see standard breakdown categories		
How to measure	Tutor records; registration records		
Collection	Sessional	Reporting	Quarterly

Name/Type	New participants		Short-term outcome
Definition/ Explanation	<p>Number of participants taking part in other related activities, new and existing.</p> <p>This counts the number of new participants that join relevant local clubs and activities.</p> <p>Collect data for this indicator from the clubs include play facilities and play projects and facilities people join. You must collect baseline figures (participants and club members) at the start of your project.</p>		
Breakdown categories	See standard breakdown categories		
How to measure	Surveys: postal; web, face-to-face, telephone		
Collection	Six-monthly	Reporting	Six-monthly

Name/Type	Healthy friends		Short-term outcome
Definition/ Explanation	<p>Healthy Friends projects should use this Progress Indicator to measure outputs. Count the number of Healthy Friends links still active after 12 weeks (or as appropriate).</p>		
Breakdown categories	See standard breakdown categories		
How to measure	Healthy mentor reports; children's own feedback		
Collection	Sessional	Reporting	Once

Name/Type	Participant Satisfaction		Short-term outcome
Definition/ Explanation	Level of satisfaction or enjoyment reported by participants		
Breakdown categories	<p>Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Note that where projects engage with children under five years old, responses may come from parents.</p> <p>Secondary beneficiaries - see standard breakdown categories</p>		
How to measure	<p>Quantitative information: through various scales including paper, Rickter, picture and word options</p> <p>Qualitative information: through various narrative, pictorial, drama and multi-media based options</p> <p>Two kinds of measures may be collected: self reported or observed</p> <p>The Toolkit will contain further details and advice. This outcome can be measured using the same tool as one or more other outcomes</p>		
Collection	On-going	Reporting	Quarterly
Name/Type	Nutrition awareness		Outcome
Explanation	<p>Nutrition awareness changes over time - using FSA 'eatwell plate', other recognised scale, agreed or age appropriate guidelines.</p> <p>Count number of participants aware of 'eatwell plate' guidelines</p>		
Breakdown categories	<p>Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Note that where projects engage with children under five years old, responses may come from parents.</p> <p>Secondary beneficiaries - see standard breakdown categories</p>		
How to measure	<p>Quantitative information: through various scales including paper, Rickter, picture and word options</p> <p>Qualitative information: through various narrative, pictorial, drama and multi-media based options</p> <p>Two kinds of measures may be collected: self reported or observed - The Toolkit will contain further details and advice</p> <p>This outcome can be measured using the same tool as one or more other outcomes</p>		
Collection	Quarterly	Reporting	Quarterly

Name/Type	Nutrition attitude	Outcome	
Explanation	<p>Changes in nutrition attitude over time - using FSA 'eatwell plate' or age appropriate guidelines.</p> <p>Count number of participants willing to change eating practices to follow 'eatwell' plate guidelines</p>		
Breakdown categories	<p>Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Note that where projects engage with children under five years old, responses may come from parents.</p> <p>Secondary beneficiaries - see standard breakdown categories</p>		
How to measure	<p>Quantitative information: through a variety of scales including paper, Rickter, picture and word options</p> <p>Qualitative information: through a variety of narrative, pictorial, drama and multi-media based options</p> <p>Two kinds of measures may be collected: self reported or observed</p> <p>The Toolkit will contain further details and advice</p> <p>This outcome can be measured using the same tool as one or more other outcomes</p>		
Collection	Quarterly	Reporting	Quarterly

Name/Type	Nutrition behaviour		Outcome
Explanation	Change in nutrition behaviour - using FSA 'eatwell plate' or age appropriate guidelines. Count number of times participants follow 'eatwell plate' food guidelines		
Breakdown categories	Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Note that where projects engage with children under five years old, responses may come from parents. Secondary beneficiaries - see standard breakdown categories		
How to measure	Quantitative information: through a variety of scales including paper, Rickter, picture and word options Qualitative information: through a variety of narrative, pictorial, drama and multi-media based options Two kinds of measures may be collected: self reported or observed The Toolkit will contain further details and advice This outcome can be measured using the same tool as one or more other outcomes		
Collection	Quarterly	Reporting	Quarterly

Name/Type	Physical activity awareness		Outcome
Explanation	<p>Change in physical activity awareness over time using 5x60 or 5x30 guidelines.</p> <p>Count the number of participants aware of 5x60/5x30 guidelines</p>		
Breakdown categories	<p>Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Note that where projects engage with children under five years old, responses may come from parents.</p> <p>Secondary beneficiaries - see standard breakdown categories</p>		
How to measure	<p>Quantitative information: through a variety of scales including paper, Rickter, picture and word options</p> <p>Qualitative information: through a variety of narrative, pictorial, drama and multi-media based options</p> <p>Two kinds of measures may be collected: self reported or observed</p> <p>The Toolkit will contain further details and advice</p> <p>This outcome can be measured using the same tool as one or more other outcomes</p> <p>Questions to establish this behaviour will also cover sedentary behaviour such as watching TV or reading, and play</p>		
Collection	Quarterly	Reporting	Quarterly

Name/Type	Physical activity attitude		Outcome
Explanation	<p>Change in physical activity attitudes over time - using 5x60 or 5x30 guidelines.</p> <p>Count number of participants willing to undertake 5x60/5x30 levels of activity</p>		
Breakdown categories	<p>Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Note that where projects engage with children under five years old, responses may come from parents.</p> <p>Secondary beneficiaries - see standard breakdown categories</p>		
How to measure	<p>Quantitative information: through a variety of scales including paper, Rickter, picture and word options</p> <p>Qualitative information: through a variety of narrative, pictorial, drama and multi-media based options</p> <p>Two kinds of measures may be collected: self reported or observed</p> <p>The Toolkit will contain further details and advice</p> <p>This outcome can be measured using the same tool as one or more other outcomes</p> <p>Questions to establish this behaviour will also cover sedentary behaviour such as watching TV or reading, and play.</p>		
Collection	Quarterly	Reporting	Quarterly

Name/Type	Physical activity behaviour	Outcome
Explanation	Change in physical activity levels / behaviour. Count on how many days per week participants do the recommended 60 or 30 minutes of physical activity. Track this over the life of the project.	
Breakdown categories	Primary beneficiaries: children 0-18 months; 18-36 months; 3-5 years; 5-7 years; 7-11 years. Note that where projects engage with children under five years old, responses may come from parents. Secondary beneficiaries - see standard breakdown categories	
How to measure	Quantitative information: through a variety of scales including paper, Rickter, picture and word options Qualitative information: through a variety of narrative, pictorial, drama and multi-media based options Two kinds of measures may be collected: self reported or observed The Toolkit will contain further details and advice This outcome can be measured using the same tool as one or more other outcomes Questions to establish this behaviour will also cover sedentary behaviour such as watching TV or reading, and play.	
Collection	Quarterly	Quarterly

Name/Type	Partnership	Outcome
Explanation	The perceived strength of the partnership.	
Breakdown categories	Existing partners New partners – include play partners as a category	
How to measure	Partnership assessment matrix	
Collection	Quarterly	Quarterly

Part 3: further guidance

This section provides further guidance on:

- Monitoring and evaluating with children;
- Further information sources; and
- Definitions.

Monitoring and evaluating with children

The Children and Young People's Participation Consortium for Wales, the Participation Unit and the Welsh Assembly Government's Participation Project are working together to promote children's and young people's (0-25 years) participation in decision-making in Wales. They have developed a set of National Standards for participation that you should follow – see:

<http://www.participationworkerswales.org.uk/participation>.

Working with children

When working with children and collecting monitoring and evaluation information you should consider not only techniques that are more suitable for children (for example drawing) but also their physical, emotional and intellectual development stage. This will not only alter their attention span but may also have implications for the nature of the information you give them and the informed consent you provide. While it is good practice to ask children if they wish to take part you should always also get consent from their parents.

Benefits for children

Children can benefit in many ways from participating in all aspects of projects, including monitoring and evaluation, personally and socially. Children who actively take part in your project will learn more about responsibility and develop their:

- self-confidence and self-esteem;
- skills including communication and negotiation; and
- group-working skills.

Benefits for organisations

Organisations can benefit in various ways through children's participation in monitoring activities. In particular, children will help organisations to:

- Develop relationships;
- Ensure relevance of the project to the children themselves;
- Improve outcomes;
- Develop your credibility and reputation;
- Provide a wide variety of views; and
- Improve capacity and sustainability.

Community benefits

By including children in your monitoring and evaluation you will help to develop the next generation of active citizens. Their participation helps children's issues to achieve greater importance on economic, social and political agendas. Finally, including children in these activities improves governance for everyone.

Data collection

If you are working with very young children you will need to rely on their parents or other adults to report to you about their likes or behaviour. There are also differences between older children which you should bear in mind when seeking information. In general:

Children who are about eight years old can:

- Answer simple questions in an interview;
- Complete questionnaires;
- Provide information about their eating and activities but you will have to examine this information with care.

Children who are younger than eight years old:

- Find interviews difficult;
- Are very influenced by people around them, interviewers and other children; and
- Cannot provide reliable self-reports.

Figure 10 Data: collection and reliability

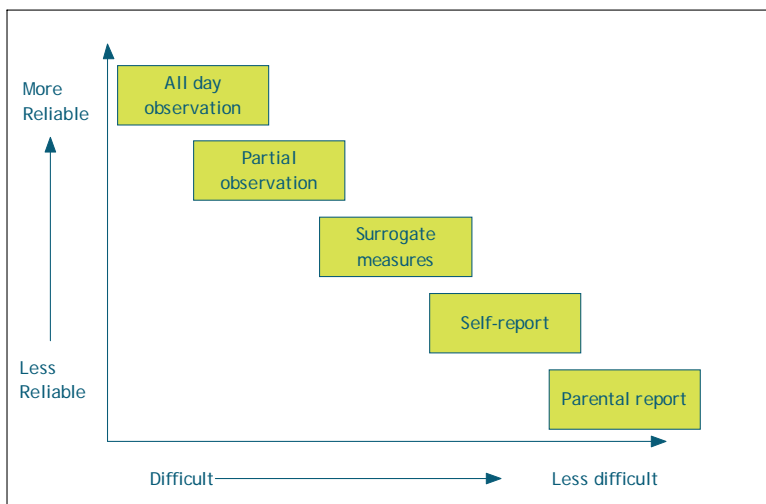


Figure 10 shows you that the more reliable the evidence you want to collect, the more difficult and the more time-consuming it is. It will also be more expensive to collect. The easier it is to collect the information the less reliable it might be. While many parents will be able to tell you what their children do while they are at home; they may not be able to tell you what the child does at school. This means that you may not be able to build up an accurate picture of a child's daily life if you only work with parents.

When working with children it is best practice to:

- Ask about behaviour or experience or views in the very recent past.
- Work with the person who spends most time with the child
- Do not link getting information with a reward.

Criminal disclosure

People who meet children when monitoring and evaluating should always have been through the criminal disclosure process. The Criminal Records Bureau (CRB),

launched in 2002, works to identify those who are unsuitable for work with children. Organisations whose staff and volunteers who work with children or vulnerable adults can ask anyone to go through a Standard or Enhanced criminal disclosure check. This information may be both sensitive and personal and must be handled according to guidance issues by the CRB. Further information about CRB checks can be found at the following web sites:

<http://www.crb.gov.uk/>

<http://new.wales.gov.uk/topics/educationandskills/playlearngrowsub/playlearngrow/usefulcontacts/?lang=en> (English)

or

<http://new.wales.gov.uk/topics/educationandskills/playlearngrowsub/playlearngrow/usefulcontacts/?lang=cy> (Welsh)

Further information sources

Monitoring and evaluation

Many of these guides will also contain information about feedback and dissemination.

The Big Lottery Fund, Self-evaluation: a handy guide to sources:
http://www.biglotteryfund.org.uk/er_eval_self_evaluation_uk.pdf

The NCVO's guide to monitoring and evaluation:
<http://www.ces-vol.org.uk/index.cfm?pg=140>

A UNICEF Guide for Monitoring and Evaluation: Making a difference? This was written for this NGO and for national level work but it contains information about good practice: <http://www.preval.org/documentos/00473.pdf>

Measuring the Magic: evaluating and researching young people's participation in public decision making:
<http://www.carnegieuktrust.org.uk/files/main/Measure%20the%20Magic.pdf>

Physical activity evaluation handbook:
<http://www.cdc.gov/nccdphp/dnpa/physical/handbook/>
<http://www.evaluationsupportscotland.org.uk/>

Logic Models

WK Kellogg Foundation, Logic Model Development Guide:
<http://www.wkkf.org/Pubs/Tools/Evaluation/Pub3669.pdf>

<http://www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html>

http://www.managementhelp.org/np_progs/np_mod/org_frm.htm

<http://www.healthscotland.com/understanding/evaluation/support/logic-models.aspx>

Many of these examples separate outputs and outcomes. However, the BIG Lottery Fund uses 'outcome' more broadly to include both terms.

Feedback and dissemination

<http://www.evaluationsupportscotland.org.uk/article.asp?id=51&node=learning>

Participation

Too Many Pages: SCOVO's Guide to Involving Service Users to Make Better Services. This is written in English and Welsh. Its main audience is the learning disability sector, but it is relevant to other sectors, too. Its main focus is on participation and involvement, but there are also useful ideas about feedback and evaluation: <http://www.learningdisabilitywales.org.uk/toomanypages.php>

A practical guide to patient and public involvement in Wales:

<http://www.wales.nhs.uk/publications/signposts-e.pdf>

Participation: finding out what difference it makes:

<http://www.scie.org.uk/publications/resourceguides/rq07/files/rq07.pdf>

Working with children

Further information on working with children in participation, monitoring and evaluation can be found at:

<http://www.funkydragon.org/>

<http://www.participationworkerswales.org.uk/index>

<http://www.childreninwales.org.uk/index.html>

The Child Rights Information Network has a useful document called 'Children and Participation: Research, Monitoring and Evaluation with Children and Young People' which can be downloaded at:

<http://www.crin.org/hrbap/index.asp?action=theme.themeltem&subtheme=15&item=4711>

The National Children's Bureau: www.ncb.org.uk/

The Carnegie Young People's Initiative has a booklet and a DVD called: "they help you get respect":

http://cypi.carnegieuktrust.org.uk/files/they_help_you_get_respect.pdf

<http://www.youngminds.org.uk/>

This is not an exhaustive list and you may find other helpful documents elsewhere.

Definitions

Activity

An activity is an action taken to deliver services or sessions or goods, such as dance sessions or a health home tutorial.

Additionality

Additionality is made up of the benefits that result from your project or programme, that would not otherwise have happened.

Baseline

A baseline is a set of information that tells you and others what conditions are like before a project starts. You will need to collect data and information to build a baseline. This will probably use a combination of data from, for example the Census, locally available information, and information from your participants.

Deadweight

This is the activity that would have taken place even if your project had not been in place.

Displacement

This is the activity that has been displaced from the area by your project.

Evaluation

Evaluation means assessing the true impact of a strategy, programme or project. It includes value for money, unintended results and lessons for the future.

Indicator

An indicator is measure or a partial measure of an input, an activity, or an outcome.

Input

An input is a resource used on your project. Examples include: a volunteer's time, money spent on providing free transport to a Healthy Places Festival.

Logic models

A logic model is a description of your project. It identifies the key parts of your project, shows the connection between activities and expected outcomes and includes information about factors which might influence your project.

Milestones

These are stages or targets in a project or programme. These help to link your project's progress to your overall outcomes.

Monitoring

Monitoring is the systematic collection of information about a project during its lifetime.

Multipliers

These are the knock-on impacts of your project across all activities and may help to create further demand and support for your own work.

Outcome

An outcome is the eventual benefit. This is what the project set out to achieve.

Qualitative data

Qualitative data or information is gathered from interviews, observation, documents, media such as film or audio recordings, pictures and stories. This information contributes to understanding how a project works.

Quantitative data

Quantitative information can be collected from questionnaires, records and measurement instruments. Quantitative data is counted, sorted and analysed.

Self-evaluation:

Self-evaluation is carried out or commissioned by members of the organisation responsible for the intervention. It helps you to collect and use monitoring and evaluation data to answer questions about the quality and direction of work and manage your performance.

Targets

Targets are measurable results achieved by an identified time.

BIG's Evaluation and Research Glossary

Further information about terms used in monitoring and evaluation can be found in BIG's Evaluation and Research Glossary, available at:

http://www.biglotteryfund.org.uk/index/evaluationandresearch-uk/eval_res_glossary.htm

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