# Measuring Effectiveness

A self-evaluation tool-kit for the national network of Councils for Voluntary Service (CVS)

nacvs

Charities Evaluation Services - June 2002

# CES and NACVS

## Charities Evaluation Services

CES is committed to increasing the effectiveness of the voluntary sector by developing its use of evaluation and quality systems. CES provides training, advice and information to enable agencies to plan and evaluate their services and to develop quality assurance systems. We also provide state-of-the-art external evaluation services.

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## National Association of Councils for Voluntary Service

The National Association of Councils for Voluntary Service (NACVS) is the growing network of over 300 CVS throughout England. NACVS helps to promote voluntary and community action by supporting its member CVS and by acting as a national voice for the local voluntary and community sector.

Recent research has shown that the average CVS has over 150 members, and is in contact with almost 400 local organisations. This means that with a membership of over 270 CVS spread across urban and rural areas of England, NACVS can reach over 100,000 local groups across the country.

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# Contents

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They are:

| | |
|---|---|
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ACTIVE COMMUNITY UNIT

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# Preface

This tool-kit is the product of a three-year collaboration between Charities Evaluation Services (CES) and the National Association of Councils for Voluntary Service (NACVS). Funded by the Home Office Active Community Unit, the collaborative programme was carried out between 1999 and 2002. Originally entitled 'Measuring Impact', the programme was based on, and further developed, previous work that CES had carried out with the Cumbria Local Development Agency Forum (CLDAF) and a similar programme carried out with the National Association of Volunteer Bureaux (NAVB), now Volunteer Development England.

The central aims of the programme were to:

- *develop appropriate methods that enable individual Councils for Voluntary Service (CVS) to monitor and evaluate their own work; and*
- *enable the national CVS network to collect and share monitoring and evaluation information in a comparable and consistent way.*

The programme recruited over 50 CVS across England to develop and pilot the tool-kit. These CVS are referred to as 'pilot partners'. Pilot partners were brought together through a series of workshops, during which they:

- *identified their monitoring and information needs;*
- *identified common and shared CVS aims and objectives; and*
- *gave CES examples of their current monitoring and evaluation activities.*

The pilot partners also piloted the draft tool-kit over a period of six months within their own organisations. CES gathered feedback on the piloting process through a combination of self-completed questionnaires, telephone interviews and workshops.

From March 2001 onwards the final version of the tool-kit, along with the accompanying training day, was made available to the CVS network. Over 100 CVS have now received training on how to use the tool-kit within their own organisations.

NACVS supports the growing network of over 300 CVS across England. CVS are local development agencies with four core functions:

- *support and services for local voluntary and community groups;*
- *liaison within and beyond the sector;*
- *enabling representation;*
- *developing services in response to new and changing needs.*

Increasingly, CVS have become involved in a wide range of partnerships aimed at delivering the government's social inclusion agenda.

NACVS and CVS have long recognised the need for infrastructure bodies to be able to demonstrate effectiveness to members, funders, central and local government. NACVS has therefore been very pleased to work with CES on this project. We are very grateful to the CVS pilot partners for participating in the development and pilot stage and for providing such useful and detailed information.

# Introduction

# How to use the tool-kit

- Familiarise yourself with the content and the step-by-step process of self-evaluation
- Select an area of your work that you wish to evaluate
- Use the tool-kit to guide you through the self-evaluation process
- Tailor the tools, or any aspect of them, to suit your information needs

The tool-kit provides a step-by-step guide to self-evaluation, and illustrates this process using a hypothetical, 'typical' CVS. This 'typical' CVS has emerged from the contributions of over 50 CVS pilot partners during the development stage of the tool-kit. Your CVS might differ in several ways from this 'typical' CVS, but you should be able to adapt the examples with ease.

The tool-kit also provides a set of monitoring and evaluation tools. These are included as examples to guide your self-evaluation activities.

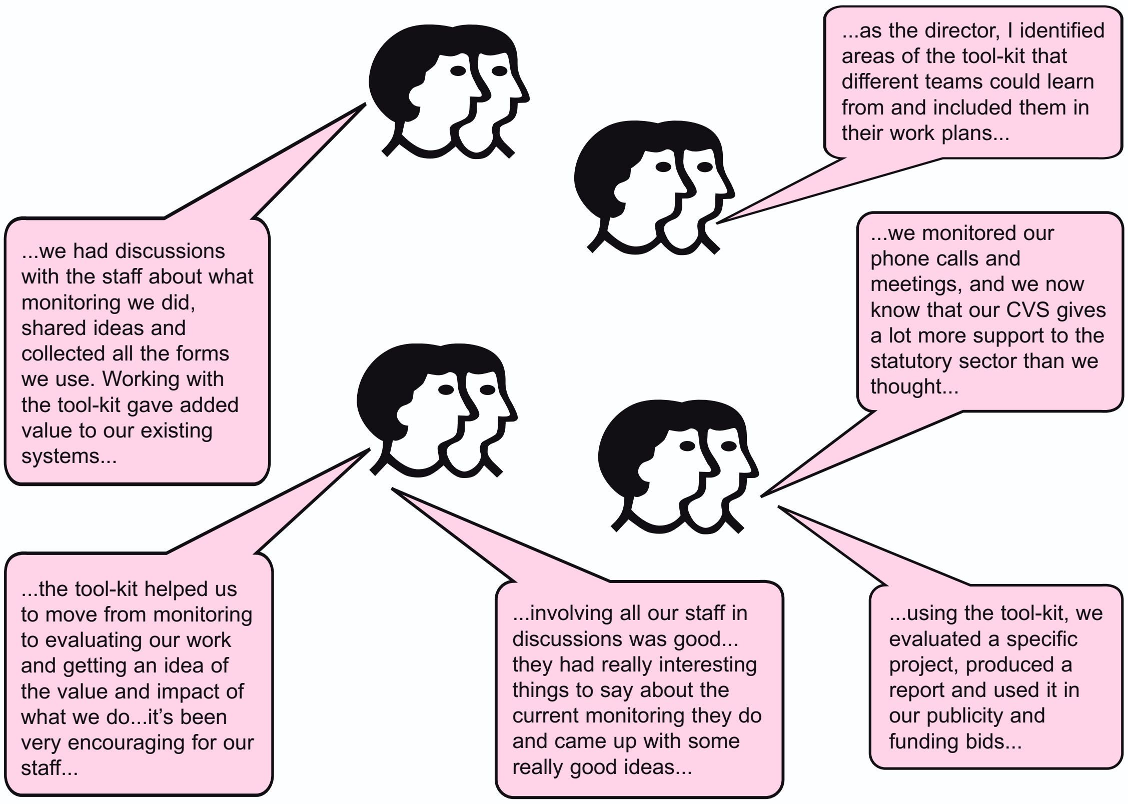
**Section 2** describes the aims and objectives of the 'typical' CVS. It also explores the levels of change these aims and objectives seek to bring about and where you should pitch your evaluation.

**Section 3** examines the target group profile information a CVS might need to collect from service users.

**Sections 4 to 7** take each of the aims and accompanying objectives for a 'typical' CVS and use them to illustrate the self-evaluation process.

**Section 8** includes a set of monitoring and evaluation tools. Some of these tools are highly specific and contain questions that you can adapt and use in questionnaires and interviews. You might be able to use the tools as they are, or you might need to adapt them to suit your information needs.

**CVS pilot partners said...**




**How this tool-kit links up with quality systems**

Many CVS are currently involved in selecting and working with a recognised quality assurance system, such as PQASSO. This tool-kit is complementary to any quality assurance system you are using and can be used to assist you in meeting important quality criteria.

There are several links between this tool-kit and a quality system such as PQASSO. A quality system sets organisational standards and provides indicators of achievement, or criteria, for those standards. This tool-kit provides detailed guidance that will help you to meet some of those standards.

Here are some examples.

*PQASSO requires your organisation to state its aims and objectives clearly. This tool-kit describes how you can clarify your aims and objectives, especially in relation to service provision. This tool-kit also provides a set of aims and objectives that have been identified as common to CVS, which you can modify and adopt as required.*

*PQASSO requires your organisation to collect feedback from your service users. This tool-kit provides you with detailed guidance on how to do this, including example questionnaires and advice on using different information collection methods.*

*PQASSO requires your organisation to monitor and evaluate your work effectively. This tool-kit gives you a simple step-by-step process by which you can develop your monitoring and evaluation activities. It also provides you with exemplary output and outcome indicators for service provision.*

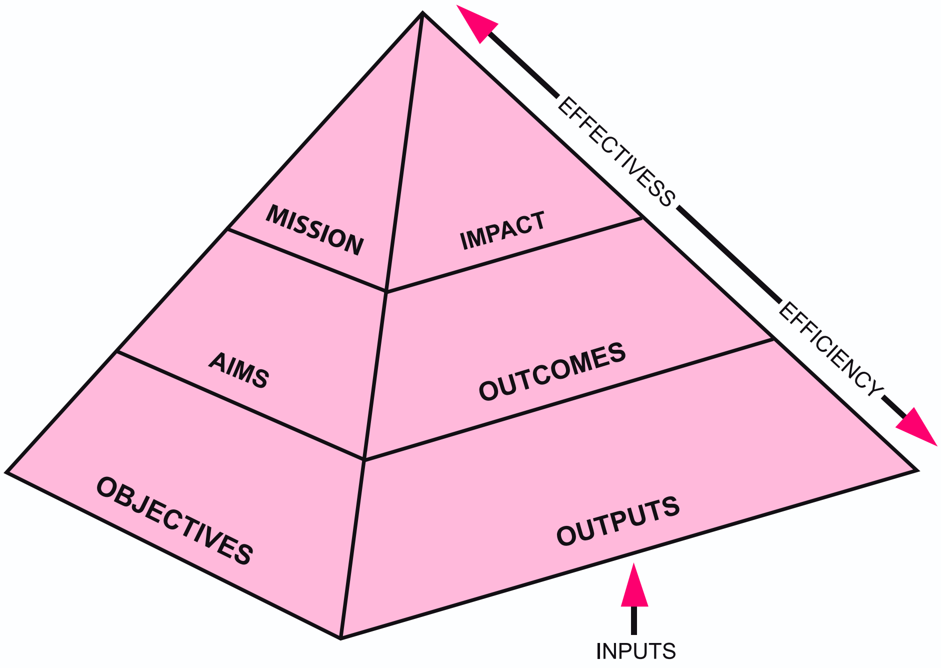
## Measuring effectiveness

Before introducing the step-by-step guide to evaluation, it is useful to define some terms used in the evaluation process.

As Figure 1 illustrates, when any evaluation is being carried out with regard to the achievement of an organisation's mission, then the impact of its work is being assessed. In the case of individual CVS:

- When you develop methods for measuring your aims, you are assessing progress towards your outcomes and the ways in which your user groups have benefited from your services. The measurement of outcomes can demonstrate how effective you are in meeting the needs of your users.
- When you are assessing progress towards your objectives, you are measuring your outputs. The measurement of outputs can demonstrate how efficient you are, particularly if you regularly integrate your findings in your planning process.

**Figure 1: Measuring effectiveness and efficiency**



## Self-evaluation is...

when an organisation uses its internal expertise to carry out its own evaluations in order to understand its own activities better and improve the way it plans, implements and manages service provision.

## Monitoring is...

the collection of consistent pieces of information that allow you to regularly check on how busy your services are, whether the service is being used by those for whom it was intended, and whether users are satisfied with the standard of provision.

## Evaluation is...

the collection of particular pieces of information that will allow you to assess or judge the value of your service.

It allows you to examine what change has been brought about or what difference your services make for the benefit of service users.

Evaluation informs decision-making on how services can become more effective.

**Figure 2: The self-evaluation cycle**

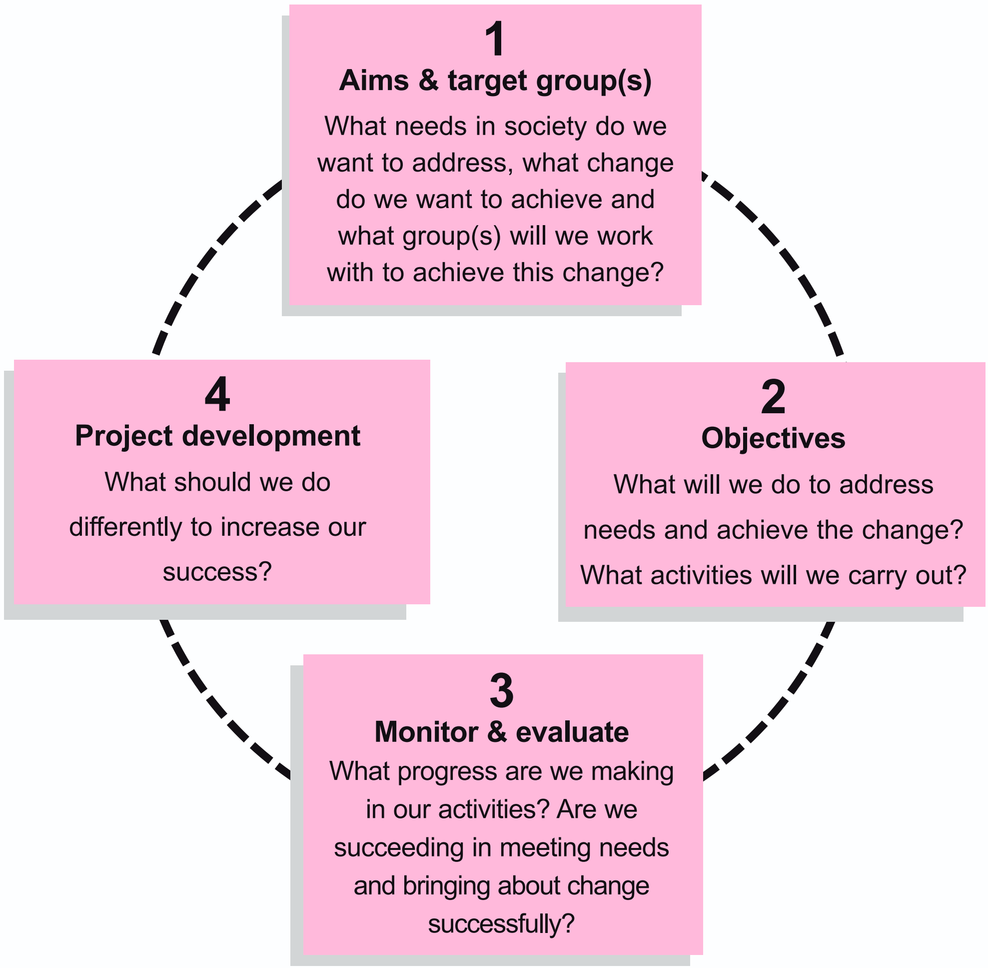



Figure 2 presents the self-evaluation cycle. This cycle shows how self-evaluation is an essential and integral part of project management and development. It also gives a broad overview of how you can begin to integrate self-evaluation in your service planning cycle.

Most voluntary sector projects begin with the identification of needs in society that the project aims to address. An understanding of these needs informs the project's aims. The needs also dictate which group or groups the project's staff work with to bring about change. Project staff then identify objectives and the activities or methods by which the project can meet needs and achieve its aims. At this stage project staff are likely to be working with a variety of stakeholders, including potential service users, in order to prioritise objectives. Once a project is underway, monitoring and evaluation help to provide answers to some key questions, such as: Are we achieving our aims and objectives? Are we providing a quality service? Are we meeting the needs of our service users? The information gathered is used to examine how the project can develop further. Within the cycle of self-evaluation, project aims are reviewed regularly to check whether they are still valid, or whether they should be altered to reflect the changing needs of the groups with whom the project is involved.

Figure 3 illustrates the framework for self-evaluation as a step-by-step process. This process is discussed in detail below and is illustrated further in subsequent sections.

**Figure 3: Step-by-step process for self-evaluation**

**STEP 1**
Clarify aims, objectives & target group(s)

**STEP 2**
Identify outcomes for aims and outputs for objectives

**STEP 3**
Identify indicators to measure outcomes and outputs

**STEP 4**
Prioritise and plan monitoring and evaluation

**STEP 5**
Collect the information

**STEP 6**
Collate, present and use the findings

## **STEP 1:** Clarify aims, objectives and target group(s)

For evaluation purposes, it is important to be clear about the following:

- your target group(s) – the group or groups in society with which you primarily work;
- your aims – the purpose of the project, or the benefits you intend to achieve for your target group(s);
- your objectives – the activities you carry out with or for your target group(s).

'Aims' can include statements of aspirations and intentions, but for evaluation purposes it is important that they should state clearly the change that an organisation hopes to achieve for the benefit of its target group(s). They should be informed by an understanding of the needs of the target group.

### Mission statements

It is common within the voluntary sector for an organisation to have a 'mission', whether this is a mission statement, an overall aim or a strategic aim. A mission statement is a broad, over-arching encapsulation of the long-term change to which the organisation is committed. Such statements tend to incorporate central values and principles that inform the organisation's approach to its activities.

### Specific aims

An overall aim or mission statement helps to give the organisation a general sense of direction. However, for evaluation purposes such statements are often too broad, and so the overall aims need to be broken down into more specific aims.

Specific aims should precisely express the change or difference that the organisation seeks to bring about within or for its target group(s). Taken together, the specific aims contribute to the longer-term change that is outlined in the overall aim or mission statement.

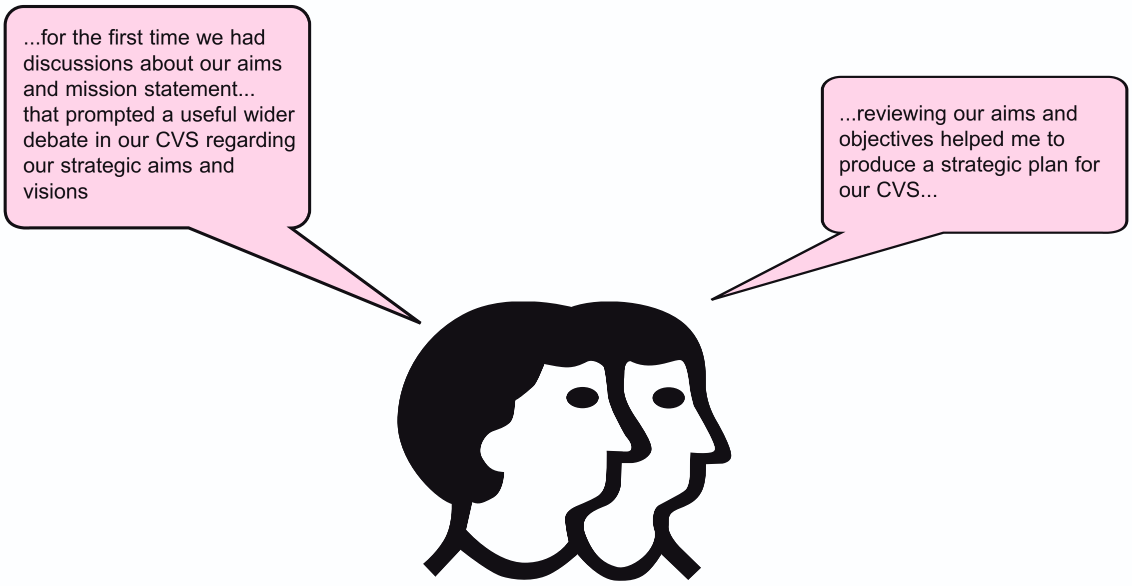
When formulating the aims, it is useful to use words that emphasise change. Start your statements with such formulations as: *to increase, to reduce, to empower, to enable, to develop, to improve,* and so on.

### Objectives

It is best to think of aims and objectives as two sides of the same coin. Aims are the changes that the organisation is trying to achieve, and objectives are the methods by which the organisation achieves its aims. In other words, objectives are the activities the organisation carries out with or for its target group(s) in order to achieve its aims. As such, one aim can have several objectives.

It is useful to start statements with words that emphasise activity. Use such formulations as: *by organising, by conducting, by providing, by distributing, by producing,* and so on.

**CVS pilot partners said...**




The difference between statements of aims and statements of objectives lies in the wording. In a way, aims and objectives give rise to further aims and objectives. For example, you might formulate a specific aim that applies to your CVS as a whole, but project-level staff could have difficulty linking their work to that aim. If you split this aim into different sub-aims, they might be able to see more clearly how their project links up with and contributes to the specific aim. Similarly, an objective that applies to the CVS as a whole can be reworded as an aim for a specific staff team. As an example, the objective *by hosting and providing training events* can be reworded as *to develop an appropriate training programme,* which makes it applicable to a training team.

A team approach to the clarification of aims and objectives is most useful, particularly if people from different levels of the CVS – for example, trustees, staff and managers – are involved. A team approach can contribute to the development of a shared vision of the organisation's purpose, and will also enable staff to understand how projects are connected to their own activities.

Your aims should be based on a good understanding of the needs of your target group(s). By involving service users appropriately in the clarification of your aims and objectives, you can better understand their needs and ensure that these are reflected in your aims.

There is often an implicit assumption within organisations that staff members share values and principles. It is important to discuss values and principles, make them explicit and promote shared understanding among different stakeholders.

## **STEP 2:** Identify outcomes for aims and outputs for objectives

When *aims* have been stated clearly, a range of possible outcomes can be identified. Outcomes are statements describing the benefits or changes that service users can expect as a result of your work. An easy way to identify outcomes is to imagine the successful completion of an aim, and describe what would be involved. Knowing which benefits your service users desire, or have gained, from your services also helps you to identify outcomes. The use of clear outcomes enables the organisation to decide what information is needed to examine the effectiveness of a service.

### Example aim

To enable organisations to gain greater access to information, practical support services and facilities.

### Example outcomes

- Organisations have increased knowledge of CVS and other available services
- Organisations have improved financial and administrative management
- Organisations have increased knowledge of current local and national developments affecting their work

When *objectives* have been stated clearly, a range of outputs to monitor can be identified. It is useful to think of outputs as sub-objectives: they are the different products or activities that either *result from* the process of carrying out the objective, or describe *how* the organisation carries out its objective.

### Example objective

By providing an information service.

### Example outputs

- Information leaflets
- An enquiry line
- A library service
- A newsletter
- A website
- Briefing sessions
- A directory

## **STEP 3:** Identify indicators to measure outcomes and outputs

Having identified outcomes for aims and outputs for objectives, the next step is to identify indicators. Indicators are the signs, clues or markers of progress or success about which you can collect information. Outcome indicators enable you to see how you are progressing towards achieving the aims; output indicators help you to assess how well you are carrying out the objectives. Indicators should be well defined and easily measured.

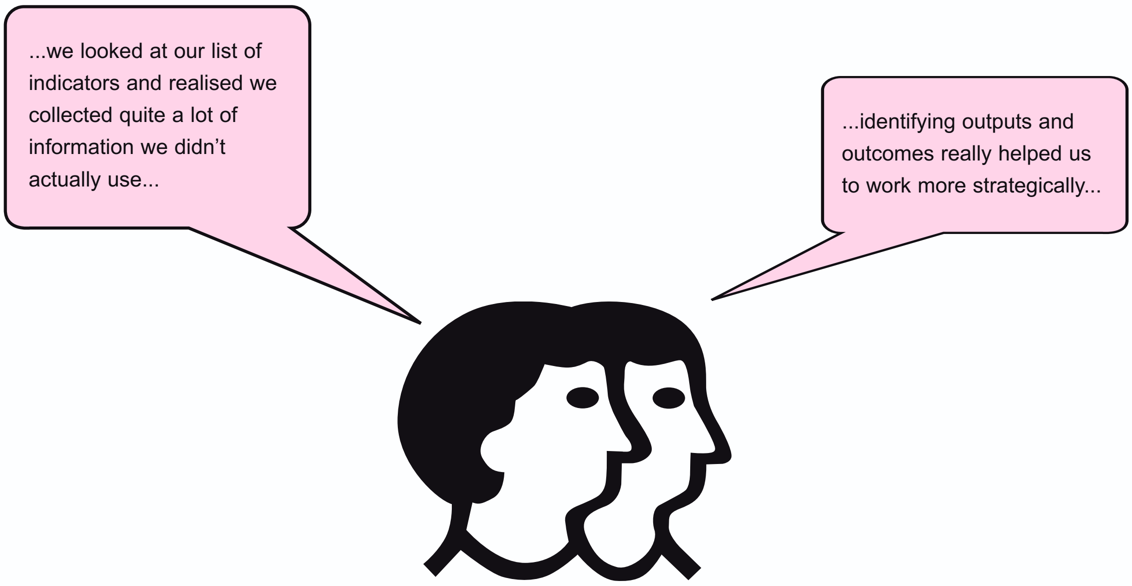
To identify outcome indicators, think about what you can measure that will show you whether an outcome has been achieved.

| Aim | Outcomes | Outcome indicators |
|---|---|---|
| To enable organisations to gain better access to information, practical support services and facilities | ‣ Organisations have increased knowledge of CVS and other available services<br>‣ Organisations have improved financial and administrative management<br>‣ Organisations have increased knowledge of current local and national developments affecting their work | ‣ Proportion of organisations that know about available services and facilities<br>‣ Number and range of organisations with improved financial systems<br>‣ Number and range of groups accessing small grants<br>‣ Number and range of organisations using CVS to keep up-to-date with national policy developments |

To identify output indicators, think about what you can measure that will show you how well an output has been achieved.

| Objective | Outputs | Output indicators |
|---|---|---|
| By providing an information service | ‣ Information leaflets<br>‣ An enquiry line<br>‣ A library service<br>‣ A newsletter<br>‣ A website<br>‣ Briefing sessions | ‣ Number of leaflets/newsletters printed<br>‣ Number of copies ordered on request<br>‣ Number of copies distributed<br>‣ Subject areas covered<br>‣ Range of enquiries<br>‣ Number of website hits<br>‣ Number of briefing sessions and topics<br>‣ Range of organisations attending |

**CVS pilot partners said...**




**Setting performance targets**

Many projects set performance targets at the beginning of the year against which they monitor their progress; they are often numerical targets. By monitoring the number of outputs, project staff can judge whether the organisation should increase its outputs and set higher targets, thus increasing efficiency.

For example, suppose that all 5,000 copies of an information leaflet are distributed within the first few weeks, and the organisation is unable to meet further requests for the leaflet. If this information is monitored, it will show the organisation that it needs to print more copies of its leaflets in the future.

Targets can also be set for outcomes, and by monitoring outcomes project staff can decide whether to set higher targets and thereby increase effectiveness.

For example, an organisation may know from an annual membership survey that only 60% of its members know about the full range of CVS services and facilities. The organisation wants to increase this proportion, and sets itself a target of 85% to work towards over the next year. It might try to achieve this target by producing leaflets about the full range of CVS services and distributing them to all its members. By comparing the results of previous and current membership surveys, the CVS can assess whether the target has been met.

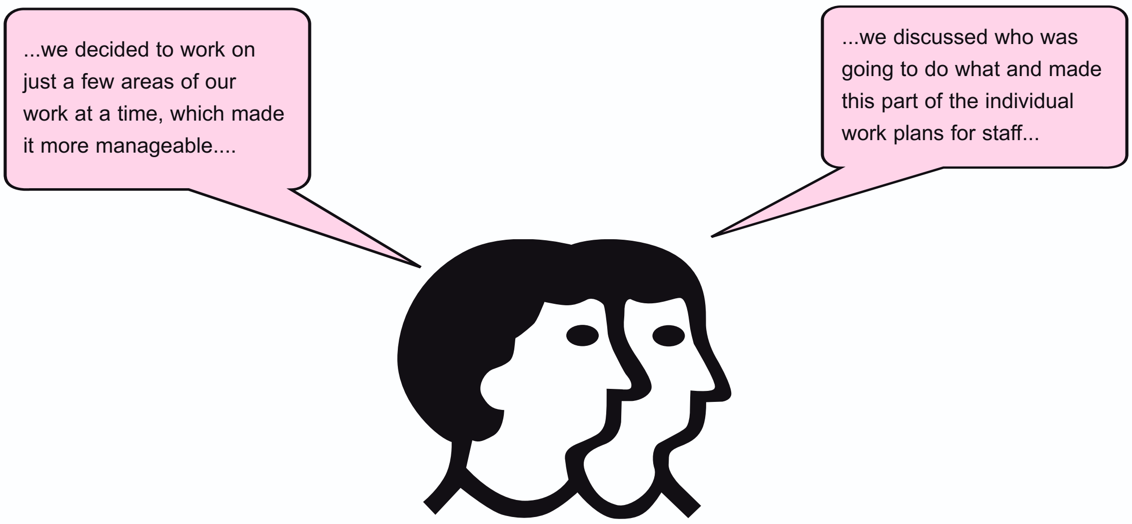
## **STEP 4:** Prioritise and plan monitoring and evaluation

It is tempting to evaluate several aspects of an organisation at the same time, but this is often unnecessary and unrealistic. It is best to start by assessing the monitoring and evaluation that your organisation already undertakes. Identify what is useful or important and note any gaps that should be addressed. Stop collecting information that serves no purpose. It is important to be clear about what you expect your self-evaluation activities to demonstrate: try to set some evaluation aims, or identify a few key questions for the evaluation to address. This will help you to remain focused.

**Example evaluation questions**

- How do service users benefit from our services?
- Could we carry out our work just as well with less money?
- Are our services still appropriate to the needs of users?
- Which groups are under-using our services?
- How do users find out about us in the first instance?

**CVS pilot partners said...**




In relation to planning self-evaluation activities, you might find it useful to consider the following questions.

- What is the *most* important thing for us to evaluate *this* year?
- What evaluation information do we *need* in order to plan next year's work?
- What information is required by our *funders*?
- What information will *staff* require to inform their work?
- Which are the most *important* or *useful* outputs and outcomes to monitor and evaluate?
- How can we ensure that staff collect the information *consistently*?
- How can we best *integrate* self-evaluation into our routine work?
- *Who* will collate, analyse and present the information?

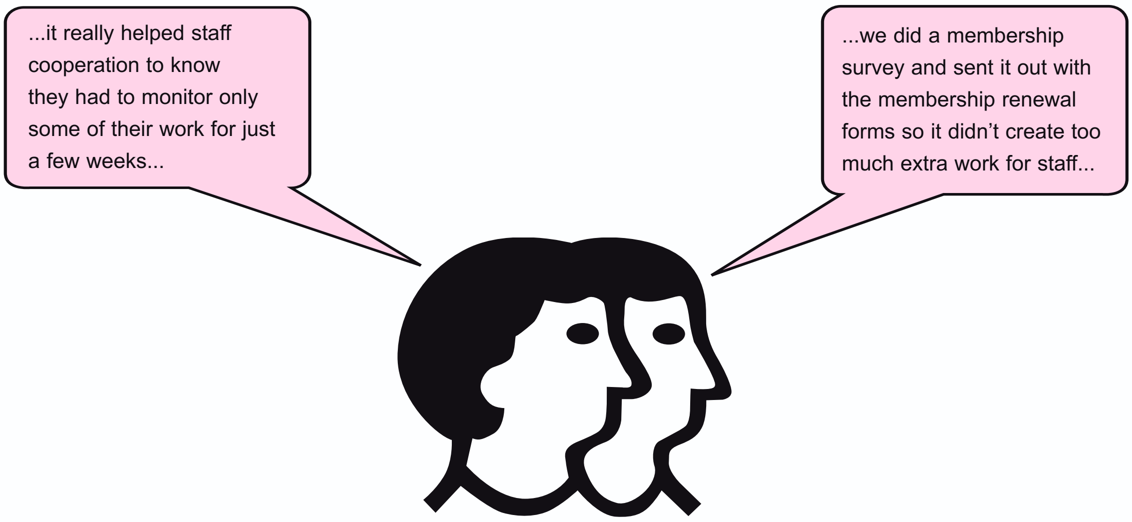
## STEP 5: Collect the information

There are various different monitoring and evaluation methods you can use to gather information. Here are some examples:

- Questionnaires (postal or face-to-face)
- Interviews (telephone or face-to-face)
- Focus groups
- Structured observation notes
- Diaries
- Case notes
- Log sheets
- Attendance records
- Case studies
- Participatory exercises
- Complaints and suggestions boxes

Your choice of methods will depend on the information you need and the resources you have. Select the method that will provide you with the information you need and which, at the same time, is the most resource-efficient.

**CVS pilot partners said...**




It is not always necessary to collect information on a continuous basis throughout the year; sometimes it is sufficient to collect it for a limited period only. For example, monitoring who is using your photocopying facilities could take place over a one-month period. Try to use methods that integrate with your existing activities, rather than those that create a lot of extra work.

When collecting information from service users it is important to explain why you are asking these questions, how you will store the information, who will have access to it and how you intend to use the results. Assure service users of confidentiality. It is also good practice to ensure that service users are informed, in an appropriate way, of the results.

## **STEP 6:** Collate, present and use the findings

Before information can be used it needs to be put together in a useful way – ie, summarised and interpreted. It is best to write a brief report to ensure that the information is available and readily accessible.

You might need to nominate staff members to collate the information and keep it centrally. The staff who are responsible for summarising the information and writing the report will need to have the necessary support to carry out this task, which can be time-consuming.

The information you have collected will need to be interpreted in relation to the original focus or aims of the evaluation. The focus was decided when the aims for evaluation were set. For example, you might need to address the following questions when putting together a brief report.

- How busy is the service?
- Which groups of service users are we reaching, and which are we not reaching?
- What do service users have to say about us?
- What benefits or changes have we brought about?
- Do we need to do anything differently?

**CVS pilot partners said...**

...our admin staff evaluated their work and collected feedback from users. We got them to do a presentation of the results...they were really positive. It really boosted staff morale. Now they're keen to do more evaluations!

...we put together a case study of our support work and used it for a funding bid, and got the funding!

You can present and use the information in a variety of ways, for instance: staff supervision, trustee meetings, internal quarterly reports, funding applications, conferences, publicity materials, annual reports and annual general meetings. It is useful to consider in advance when, where and in what format findings will be presented.

The key purpose of any self-evaluation is to facilitate decisions about how the service can be improved. Ensure that the findings and their implications are discussed and interpreted at appropriate staff, management and planning meetings. Present your findings to your key stakeholders, such as service users and funders, and explain how you have used them.

In addition, use the experience of self-evaluation to examine how you might improve the quality and usefulness of the information you gather.

## Realistic and useful self-evaluation

- Self-evaluation activities should be aimed at providing information that you can use to improve your services
- The findings should inform service review and planning cycles
- Prioritise those self-evaluation activities that will provide you with information you really need and will use
- Your self-evaluation activities should be feasible, manageable and integrated with your work activities

## 2. Aims and objectives of the 'typical' CVS

The aims, objectives and main target group of a hypothetical, 'typical' CVS are used as examples throughout this tool-kit.[1] Figures 4 and 5 on the following pages illustrate the aims and objectives of our 'typical' CVS. These statements occurred frequently in the contributions of over 50 CVS pilot partners that participated in the development stages of the tool-kit. They reflect the four functions of a CVS, as agreed by the CVS network: support and services for local voluntary and community groups, liaison, enabling representation and developing services.

The aims and objectives of this 'typical' CVS are intended to illustrate the main areas of CVS work. However, your CVS might look quite different in certain important respects. If so, you will need to modify these statements to reflect the work of your CVS.

**CVS pilot partners said...**

...we adopted the aims and objectives of the typical CVS but added one of our own...

...what's good about the typical CVS is that it made us look again at our core aims and objectives...they had become rather lost in all the project work we do...

**Stating your aims more clearly**

The specific aims of the 'typical' CVS can be further defined. For example, *to improve the capacity and quality of voluntary organisations* can be split into the following statements:

- to increase the levels of funding of voluntary organisations;
- to increase the use of quality assurance systems in the voluntary sector; and
- to improve the skills of paid and unpaid staff in the voluntary sector.

By stating your aims more clearly, the logical relationship between your objectives and aims becomes clearer. The evaluation can then be focused on more detailed questions. In addition, this means that the processes of illustrating your success and identifying areas for improvement become easier.

(1) Aims and objectives concerning the volunteering work of a CVS have not been included for two reasons: firstly, volunteering was not identified as an area of work that was shared by the majority of the CVS pilot partners; and secondly, CES has carried out a similar piece of work with volunteer bureaux that resulted in a guidance tool-kit titled *Measuring Impact: A guide to monitoring and evaluation in volunteer bureaux*. CVS that operate volunteer bureaux are referred to this publication, which is available from Volunteer Development England.

**Figure 4: Target group and aims of a 'typical' CVS**[2]

### Target group and location

All voluntary organisations and community groups in the local CVS district area, with priority given to those working with the socially disadvantaged and isolated.

### Overall aim

To support the development of an effective voluntary and community sector, promoting the principle and practice of voluntary and community activity, in order to facilitate the development of diverse, strong communities and to enhance quality of life.

### Aim 1

To improve the capacity and quality of voluntary organisations and community groups.

### Aim 2

To enable voluntary organisations and community groups to gain greater access to information, practical support services and facilities.

### Aim 3

To facilitate liaison and collaboration in the voluntary and community sector and between the voluntary, public and private sectors.

### Aim 4

To identify and prioritise the needs of local communities and develop appropriate responses.

The specific aims are not in priority order. All four aims are inter-related and contribute to achieving the overall aim.

(2)
These statements, and those in Figure 5, emerged from a series of workshops conducted by CES with over 50 CVS in England. The workshops were held in December 1999 as part of the CES and NACVS three-year 'Measuring Impact' programme, during which this tool-kit was developed.

**Figure 5: Specific aims and objectives of a 'typical' CVS**

**(*Italics denote a link with CVS core functions*)**

### Aim 1: *Development*

To improve the capacity and quality of voluntary organisations and community groups

### Aim 1: Objectives

- by hosting training events
- by conducting one-to-one development support

### Aim 2: *Support*

To enable voluntary organisations and community groups to gain greater access to information, practical support services and facilities

### Aim 2: Objectives

- by providing an information service
- by providing practical facilities and equipment
- by providing practical support services

### Aim 3: *Liaison, representation and strategic partnerships*

To facilitate liaison and collaboration in the voluntary and community sector and between the voluntary, public and private sectors

### Aim 3: Objectives

- by organising networking events and/or consultation forums
- by disseminating information on consultation and partnership opportunities and policy and/or planning initiatives
- by inviting voluntary organisations to enter consultations and partnerships and supporting them in their efforts
- by inviting voluntary organisations to represent themselves at key local policy and/or planning bodies and supporting them in their efforts
- by representing the CVS/voluntary sector at key local policy and/or planning bodies
- by advising the public and private sectors on how to involve the voluntary and community sector

### Aim 4: *Development, support and liaison*

To identify and prioritise the needs of local communities and develop appropriate responses

### Aim 4: Objectives

- by facilitating/conducting/disseminating research
- by providing written reports and oral briefings on local, regional and national research documents and policy initiatives
- by forming interest groups and/or new voluntary groups in response to expressed needs from the local voluntary and community sector
- by supporting new groups in their efforts to become independent

**Are CVS bringing about the changes to which they aspire?**

To address this question in an evaluation, you must consider what kind of change your CVS aims to bring about. Within the overall aim and specific aims of the 'typical' CVS, several levels of change can be identified. These levels of change are shown in Figure 6, which demonstrates that change becomes broader as one progresses through the levels from Level 1 to Level 4.

**Which level of change should a CVS evaluate?**

**Level 1 change occurs when the 'typical' CVS meets one of <u>its specific aims</u>** - for example, improving capacity and quality. Evaluating this level of change means examining whether certain objectives, such as carrying out training events, have indeed improved organisational capacity and quality. Self-evaluation activities should be focused on examining Level 1 change: concentrate on how well you are meeting objectives and bringing about the changes stated in your specific aims.

**Level 2 to Level 4 changes occur when the 'typical' CVS meets <u>its overall aim</u>**. *Improvement in organisational capacity and quality* is assumed to contribute to developing a more effective local voluntary and community sector as a whole. This is Level 2 change.

An *effective local voluntary sector* is assumed to lead to the *development of strong and diverse local communities*. This is Level 3 change.

The *development of strong and diverse communities* is assumed to lead to an *enhanced quality of life* for everyone in the local area. This is Level 4 change. An enhanced quality of life for local people is obviously far removed from the original CVS activity of carrying out training courses. Indeed, it can be difficult for an evaluation to assess what role CVS training courses have played in this level of change, given all the factors that affect quality of life.

**Overall aims, and the different levels of change they refer to, are very often too broad to allow for meaningful evaluation**. Before attempting to evaluate change beyond Level 1, you should consider carefully:

- the use your CVS will make of information about these broader concepts of change; and
- how your CVS will manage the complex information collection and analysis systems required to evaluate broader concepts of change.

**Figure 6: Which level of change should a CVS evaluate?**

**LEVEL 4: Enhanced quality of life**
As articulated in the overall aim, improving the quality of life for people in the local area is the ultimate change a CVS is aiming for

**LEVEL 3: Development of strong and diverse communities**
The overall aim suggests that the development of an effective local voluntary and community sector enables the development of strong and diverse local communities

**LEVEL 2: Development of effective voluntary and community sector**
The specific aims of a CVS enable the development of an effective local voluntary and community sector

**LEVEL 1: CVS specific aims**
Level 1 change occurs when a CVS carries out its objectives, thereby meeting its specific aims. For example, by hosting training events a CVS increases the capacity and quality of voluntary organisations and community groups

| Improves capacity and quality | Gives greater access to services | Facilitates liaison and collaboration | Identifies and responds to needs |
|---|---|---|---|
| Hosting training events | Providing information and practical support | Organising networking and consultation events | Forming interest groups |

**CVS Objectives**

# Monitoring and evaluating CVS core functions

## 3. Target group profile

### Target group of a 'typical' CVS

All voluntary organisations and community groups in the local CVS district area, with priority given to those working with the socially disadvantaged and isolated.

Most evaluations of services will examine the profiles of service users to assess patterns of service use and judge how far a service is working with its intended target group.

By clearly defining your target group, you can identify what profile information you might need for evaluation purposes. For example, a 'typical' CVS might need the following information.

- Whether service-user organisations are working with socially disadvantaged or isolated groups *(to see whether the CVS is working with its priority groups)*.
- The local geographical area that organisations serve or in which they are based *(to see how well the CVS is working across the district).*
- Type of charitable status *(confirming that they are voluntary organisations).*
- The individual's role in the organisations for which they work *(to confirm they are from voluntary organisations).*
- The main function of the organisations *(to show whether your CVS is working with a broad range of issues and groups of people).*
- Levels of income or staffing *(to show whether you are supporting smaller or larger organisations).*

### Examples of evaluation questions

- Are we reaching the people and organisations we really want to reach?
- Are our services equally accessed by different voluntary organisations?
- Are some groups of people or organisations under-using our services?

The information you need from your service users varies depending on the service you are delivering. For example, funders often request gender, ethnicity and disability information from participants in training courses. Having identified the profile information you might need, you should prioritise and collect the most useful pieces.

## Asking profile questions

The next step is to construct questions for service users. Remember that you want to ask questions that:

- are easy for service users to answer;
- provide answers that are easy for you to analyse; and
- provide useful information.

It is often advisable to develop specific closed questions with a range of categories represented by tick-boxes, rather than open-ended questions which are open to different interpretations, require more time to answer, and will result in responses that are more difficult to analyse.

You will have greater confidence in the data you collect if your questions are not ambiguous and everyone collects the same information in the same way. So, the way in which you ask a question is significant.

Once you have identified the questions you want to ask, agree with staff how the questions should be phrased. For example, a question on organisational funding levels could be asked differently by the enquiry service, the training service and the library service. Questions will be interpreted differently by service users and recorded differently unless agreement is reached at the beginning.

> It is useful to compare profile information on service users with statistics relevant to your geographical area.
> For example, you can compare the ethnic profile of your users with local population statistics.

For example:

- What is the organisation's total annual income, approximately?

This question can be interpreted as referring to the average income over several years or to the current year only. Responses to this question will take time to categorise and analyse.

The following question is more precise and the responses will be easier to analyse:

- In the last 12 months, what was your organisation’s total annual income?

| | | |
|---|---|---|
| ☐ No income | ☐ £10–25,000 | ☐ £51–100,000 |
| ☐ Less than £10,000 | ☐ £26–50,000 | ☐ over £100,000 |

If you ask profile questions in a consistent way across all your services you will be able to look at the profile of service users for the CVS as a whole and also compare profile information for different services.

**>Tool 1,** *Target group profile questions,* contains examples of several profile questions that you can select, modify and use.

# 4. Improving capacity and quality

## Aim 1:

To improve the capacity and quality of voluntary organisations and community groups

## Example outcomes

- Increased knowledge, confidence and skills
- Increase in organisational good practice
- Increased organisational ability to provide required services

## Example outcome indicators

- Percentage of service users who say their knowledge has increased
- Number of service users applying learning in their organisations
- Percentage of participants on accredited courses achieving qualifications
- Percentage of organisations developing organisational policies and procedures
- Organisational funding
- Staffing levels
- Proportion of organisations obtaining legal status

## Example evaluation questions

- How effective are we in improving the capacity of organisations?
- Do our activities result in organisations adopting good practice and policies?
- Are we improving our service users' knowledge and skills?

### Collecting information about outcomes

It is useful to make a distinction between indicators that are measurable in the short term and those that are more relevant in the long term. Information on short-term outcome indicators can be collected from service users while they are using the service. For example, immediately after a fundraising training course or a series of one-to-one development sessions, service users can be asked whether their knowledge has increased as a result.

Increased funding and staffing might take some time to occur, so organisations should be contacted at a later date to collect the relevant information. It is best to plan ahead to ensure that your CVS can manage the extra work involved.

The most appropriate ways to collect information about long-term outcomes are interviews, case studies and postal questionnaires.

- Telephone interviews can be used to contact training participants six months after their course to find out how they have applied their learning in their organisations.
- Postal questionnaires can be used to survey CVS members (and non-member service users) annually to track increases in capacity.

> **Tool 3,** *Service-user feedback on development support*, and **Tool 4**, *Training feedback form*, include example questions to assess short-term outcomes that you can modify and use.

> **Tool 3,** *Service-user feedback on development support,* provides examples of questions about quality of service that can be completed by clients when a piece of support work comes to an end.

> **Tool 7,** gives examples of questions about outcomes for a membership survey.

> **Tool 11,** provides guidance for those using interviews.

> **Tool 14,** provides guidance for those who analyse questionnaires.

> **Tool 15,** provides information about how to collate and present results in a report format.

## Case studies

The case study method is a good way of collecting more detailed information to illustrate the process by which an organisation has developed.

Case studies can also be used to demonstrate the valuable role that a CVS has played in that process.

**Tool 12** provides guidance for those implementing case studies.

**Aim:** *To improve the capacity and quality of voluntary organisations and community groups*

## Objectives

- By hosting training events
- By conducting one-to-one development support

## Example outputs

- Training courses
- Course handouts
- One-to-one sessions

## Example output indicators

- Number of courses and one-to-one sessions
- Length of courses and sessions
- Subjects covered
- Number of places and sessions available, and number taken up
- Number of courses and sessions cancelled
- Number and profiles of participants
- Percentage of courses leading to qualifications
- Percentage of course participants satisfied with the content and delivery of courses
- Percentage of participants satisfied with quality of course handouts

These output indicators include not only measures of how efficiently your organisation is carrying out training and one-to-one sessions, but also measures of the quality of your outputs – for example, the standard of course handouts and delivery of course content. These indicators measure quality of output in a numerical way: that is, in terms of the percentages of participants satisfied with the quality.

**Collecting information about outputs**

Most of the information about outputs can be easily collected by staff in the course of keeping basic activity records. Staff can record information for each course under separate file headings – for example, how many places are available on courses and how many are taken up. This will enable staff to look back over a specific time period and present summary information.

Recording information in this way is quite easy for training activities because each course is a distinct, contained event. With one-to-one development support, sessions can evolve over time and a different sort of recording system might be needed.

**> Tool 2**, *Agreement form for one-to-one development support,* is an example of how development staff might record their activities with each client. It can be adapted for use as a file for each client and can also function as a formal agreement or contract.

Feedback from service users on the quality of service can be gathered routinely through training feedback forms completed by participants towards the end of a training course.

**> Tool 4**, *Training feedback form,* includes questions that you can modify and use.

## Participatory evaluation methods

Sometimes it is necessary to collect more detailed feedback from training participants to assess how a particular course might be improved. Consider using participatory methods

**(see Tool 10)**

For each of the distinct services identified in the objectives, decide what profile information you require, prioritise the most important and useful information, and decide how to phrase questions so that they will be easy for service users to answer.

**> Tool 1** contains several profile questions that you can modify and use.

# 5. Improving access to information, practical support services and facilities

## Aim 2:

To enable voluntary organisations and community groups to gain greater access to information, practical support services and facilities

## Example outcomes

- Increased knowledge of available services and facilities
- Increased awareness of current local and national developments
- Improved financial and administrative functions
- Improved ability to carry out routine work activities

## Example outcome indicators

- Proportion and range of organisations that know about CVS and other services
- Proportion and range of organisations using CVS information, practical support services and facilities
- Number and range of groups accessing small grants
- The extent to which groups are better able to carry out their routine work activities
- Organisations that are aware of current local and national developments affecting their work

## Example evaluation questions

- How busy is the enquiry service?
- Do service users value our newsletter?
- How important are the practical facilities to service users?
- Are our service users from particular types of organisations?

**Collecting information about outcomes**

You can find out what proportion of organisations know of, use and value CVS services by including a question on your membership survey. You may also want to include non-members in the survey to compare the results.

**> Tool 7** includes example questions concerning knowledge about and value attached to services; these could be used in a membership survey.

**>** To obtain information on the proportion and range of organisations accessing CVS services, you can modify **Tool 6**, which has been designed specifically for practical services and facilities.

Case studies are an appropriate way of illustrating the extent to which groups are better able to carry out their routine work activities because of your practical support services and facilities. Similarly, they can be used to demonstrate the value of a CVS administering grants on behalf of community groups. It is useful to select groups that you have worked with over a period of time to better illustrate how they have benefited from your services.

**> Tool 12** provides guidance on how to conduct a case study.

To examine whether organisations have an increased awareness of current local and national developments, it is important that you select the activity that is most likely to involve the provision of up-to-date information. This could be your newsletter, for instance.

**> Tool 9** provides guidance on evaluating newsletters, and includes questions to establish the value of newsletters in keeping organisations informed of local and national developments.

**>** You might wish to obtain feedback on whether a service user made contact with the agency or resource to which they were referred, and also on the value that service users attach to your CVS as a source of information. **Tool 5** is an 'enquiries monitoring form' that you can modify and use as required. Follow up the service users that you have referred to outside agencies and resources, and ask them to return completed forms by a certain date.

**Aim:** *To enable voluntary organisations and community groups to gain greater access to information, practical support services and facilities.*

## Objectives

- By providing an information service
- By providing practical facilities and equipment
- By providing practical support services

## Example outputs

- Enquiry line
- Library service
- Newsletter
- Use of rooms, photocopiers, fax machines and computers
- Administration of funds on behalf of community projects
- Provision of temporary office space for community projects

## Example output indicators

- Enquiry line
- The number of calls
- The number of organisations
- Profiles of organisations
- Subjects of enquiries
- Organisations to which callers are referred by the CVS

### Collecting information on outputs

The information you collect about your outputs can tell you how many times a particular service is used, by whom and for what purpose. This information can be compared with how often that service is made available. This should allow you to judge how busy the service is and whether you need to increase its availability.

**> Tool 5** has been designed as an enquiry service monitoring form. You can tailor it to suit your CVS and use it to monitor the enquiry service for a short period, say for one month. All staff will need copies of the form and they must have a clear, shared understanding of how and when to complete it. Only staff dealing with the subject of the enquiry should complete it. Reception staff who answer calls should not complete it unless they are dealing with the subject of the enquiry.

**>** Similarly, **Tool 6** provides an example of a monitoring form for practical facilities that you can tailor and use over a limited period of time, for example one month.

**>** Staff will be able to collect information on some of the other output indicators by simply keeping records. For example, staff might need only to record the name and profile of the community group for which funds are administered, the amounts given, and what they were used for.

**>** See **Tool 9** for guidance on evaluating your newsletter as a source of information.

**Identify what profile information is needed**

When deciding which organisational profile details to collect about service users, it is important to think about what is appropriate, practical and feasible in relation to each service.

- Avoid asking too many questions.
- Prioritise the pieces of information that you really need.
- Select only those questions that will give you enough information to assess the range of organisations that use your services.

> **Tool 1** includes several profile questions that you can modify and use.

**Collate and present the information**

Information relating to greater access can be collated and presented in different ways.

- You might want to distinguish between distinct services and facilities, and collate only relevant information.

- Alternatively, you might want to work with responses to particular questions from users of different services and facilities. It might be useful to present such information for a particular question: for example, how valuable are CVS services and facilities to service users?

> **Tool 14** provides guidance for analysing questionnaires.

> **Tool 15** provides guidance for writing reports.

# 6. Facilitating liaison and collaboration

## Aim 3:

To facilitate liaison and collaboration in the voluntary and community sector and between the voluntary, public and private sectors

## Example outcomes

- Increase in the number of collaborative projects within the voluntary and community sector
- The voluntary sector is an integral part of local planning and policy-making
- Services across voluntary and public sector organisations are 'joined up'
- Improved access to funding streams is obtained through partnership processes
- Value is added to local voluntary and community services through partnership with the public and private sectors and through inter-agency networking

## Example outcome indicators

- Number of collaborative projects within the voluntary and community sector
- Number of voluntary organisations informed about key local and national networks and partnerships
- Number of key local planning and policy bodies that have active voluntary sector representation
- Numbers and types of local voluntary and public sector organisations working collaboratively
- Number of voluntary organisations working in partnership with private sector agencies
- Amount of additional funding for the voluntary sector through partnerships

## Example evaluation questions

- Are voluntary organisations better informed of local and national policy initiatives?
- How many key local policy or planning bodies have voluntary sector representation?
- Are more local voluntary organisations working collaboratively?

**Decide how to collect information about outcome indicators**

The annual membership survey is an appropriate method by which you can track changes in the local voluntary sector over time. If the survey asks for details of collaborative work with other agencies, you can assess whether the proportion of members working collaboratively has increased. Similarly, you can track increases in funds brought into the sector through inter-agency partnerships.

In gathering information about service users' knowledge of key local and national networks, it is useful to name these networks. If not, then one way to find out about these networks is to ask service users to name the local and national networks with which they are involved. Once your CVS becomes aware of the range of networks, it is easier to survey network involvement regularly – for example, on an annual basis – and track changes over time.

> **Tool 3** includes questions designed to measure whether organisations are better informed about liaison and collaboration as a result of the one-to-one development support provided by a CVS.

> **Tool 7** provides examples of questions for a membership survey and includes some questions about liaison, partnerships and involvement in networks.

> **Tool 13** provides guidance on how to evaluate consultation forums facilitated by a CVS.

> **Tool 14** provides guidance on analysing questionnaires.

**Aim:** *To facilitate liaison and collaboration in the voluntary and community sector and between the voluntary, public and private sectors.*

## Objectives

- By organising networking and consultation events
- By disseminating information on consultation, partnership opportunities, policy and/or planning initiatives
- By supporting voluntary organisations in their efforts to enter consultations and partnerships
- By supporting voluntary organisations in their efforts to represent themselves at key local policy and/or planning bodies
- By representing the CVS/voluntary sector at key local policy and/or planning bodies
- By advising the public and private sectors on how to involve the voluntary sector

## Example outputs

- Information leaflets
- Network events
- Consultation documents
- Advice meetings about partnership sessions with organisations
- One-to-one meetings with key agencies and policy-makers
- Meetings, seminars and consultation sessions with public sector agencies
- Meetings, seminars and consultation sessions with private sector agencies

## Example output indicators

- Numbers and range of key partnership opportunities and policy and/or planning initiatives about which written information was distributed
- Amount and scope of written information distributed
- Numbers of networking and consultation events organised
- Numbers and types of organisations entering partnerships with CVS support
- The number and range of key local planning and/or policy bodies on which the CVS is represented
- Numbers of organisations supported in their efforts to represent themselves at key local planning and policy bodies
- Numbers and range of private sector companies and public sector agencies
- Range of advice provided to private and public sector agencies

**Collecting information about outputs**

Most of the information about outputs in relation to liaison and collaboration can be gathered relatively easily by the individual staff members who are most frequently involved in consultation meetings, network events and representation on planning and policy bodies.

It may be useful to use a short, structured quarterly-report format that all CVS staff members who are involved in this work can complete. Nominate a staff member to collect completed reports and distil them into one quarterly report with the same structured format, thereby presenting one report for CVS activities in liaison and collaboration.

**> Tool 8** is an example of a quarterly reporting format designed for the 'typical' CVS, but you will need to tailor this tool more specifically to the output indicator you need to monitor.

**> Tool 13** offers guidance on evaluating the process of consultation forums.

**> Tool 4** can be modified to gather feedback on the quality of networking and consultation events organised by the CVS.

**Identify the profile information needed**

You will need to collect some profile information from the organisations and groups who participate in your networking and consultation events. It is important to ask only for information that you will use, for example:

- staffing and/or income levels;
- disadvantaged groups they work with; and
- whether they are members of your CVS.

**>** See **Tool 1** for examples of appropriate profile questions.

# 7. Identifying and responding to community needs

## Aim 4:

To identify and prioritise the needs of local communities and develop appropriate responses

## Objectives

- By facilitating/conducting/disseminating research
- By providing written reports and oral briefings on local, regional and national research documents and policy initiatives
- By forming interest groups and/or new voluntary groups in response to expressed needs from local communities and the voluntary sector
- By managing and supporting new groups in their efforts to become independent

Evaluation against this aim and its objectives first requires the CVS to clarify the specific needs for which it is developing appropriate responses.

There are various community needs that may be identified and prioritised by national government policy initiatives. A few examples are:

- the health needs of particular minority ethnic communities, or refugees and asylum seekers;
- regeneration of deprived local areas;
- sexual health and pregnancy education for young people; and
- the social-care needs of people with disabilities or mental illness.

The simplest way to evaluate against this aim is to identify the specific community needs your CVS is addressing and then identify your outputs and outcomes in relation to those specific needs. Your CVS is likely to be involved in addressing multiple community needs so it is important that you decide which ones you wish to evaluate. For example, you might have prioritised your activities in relation to addressing the health needs of local refugees and asylum seekers.

If you identify specific community needs, you can identify specific outcomes. Thinking about appropriate responses to the health needs of local refugee communities may lead you to identify the outcomes illustrated below.

## Aim 3:

To identify and prioritise the needs of local communities and to develop appropriate responses

**For example:** to develop responses to the health needs of local refugee communities

## Example outcomes

- Development of relevant interpretation services in local GP surgeries and hospitals
- Development of local health education initiatives for refugee communities
- Development of health advocacy for refugee communities

## Example outcome indicators

- Interpretation, health education and advocacy are regular items on the agenda of forums that the CVS is involved with
- The CVS and/or voluntary organisations have entered into consultations with local health authorities or primary care groups/trusts to discuss interpretation service provision
- Local voluntary organisations and community groups have gained access to funding to develop health education and advocacy services for refugee communities

**Collecting information outcomes**

Information on the above outcome indicators can be gathered easily by keeping records of the following:

- agenda items and subjects discussed at forum meetings;
- consultations and representation support given to organisations, forming the basis of dialogue with the local health authority; and
- the funding secured and relevant service provision developed by organisations that have received one-to-one development support from the CVS.

## Example evaluation questions

- Is the CVS responding to nationally identified needs?
- Are we enabling organisations to address the needs of their service users?
- Have our activities resulted in an improvement in local service provision to meet community needs?

There may be instances in which you need to contact organisations to gather follow-up information. In these cases you may want to consider using telephone interviews.

> **Tool 11** provides guidance on interviews.

> **Tool 13** provides guidance on evaluating the process of forums and other regular meetings.

> **Tool 15** provides guidance on how to collate the information and present it in a report format.

**Aim:** *To identify and prioritise the needs of local communities and develop appropriate responses.*

## Objectives

- By facilitating/conducting/disseminating research
- By providing written reports and oral briefings on local, regional and national research documents and policy initiatives
- By forming interest groups/new voluntary groups in response to expressed needs from local communities and the voluntary sector
- By managing and supporting new groups in their efforts to become independent

## Example outputs for refugee health needs

- Support sessions
- New initiatives
- Written reports
- Written briefings
- New groups

## Example output indicators for refugee health needs

- Number of existing refugee and other organisations providing support on health issues to refugees and asylum seekers
- Profile of organisations
- Subject of support
- Number of support sessions
- Number of new initiatives formed in response to refugee health needs
- Number of meetings organised
- Number of organisations in attendance
- Subject areas raised and discussed
- Number and range of written materials produced
- New groups formed to address refugee health issues

**Collecting information about outputs**

**> Tool 1** contains many questions about organisation profile that you can modify and use. It is important to tailor these in relation to the community need that you are evaluating. For example, many refugee organisations are community-specific and you will need to ensure that the ethnic profile questions reveal this information.

**> Tools 2 and 3** on one-to-one development support can be modified and used to record output information, and also to collect feedback from the refugee organisations with which you work.

If you already conduct an annual membership survey or record member organisations' remit to work with specific groups, then you will have information relating to how many local organisations are working specifically with refugees and asylum seekers. See **Tool 1** for organisational and membership profile questions.

Gathering certain information will mean that staff need to keep simple records. Information that needs to be recorded might include:

- the number of organisations attending meetings;
- the subject areas discussed;
- research reports distributed; and
- policy briefings produced.

All this information can be recorded in the minutes of meetings.

# 8. Helping NACVS to channel your experience

The National Association of Councils for Voluntary Service (NACVS) is a growing network of over 300 CVS throughout England. NACVS helps to promote effective voluntary and community action through its member CVS by providing them with a range of support services and by acting as a national voice for the local voluntary and community sector.

The 'Measuring Impact' project saw NACVS and Charities Evaluation Services working together to:

- enable CVS to measure their effectiveness in delivering services and monitor the impact that such delivery has on the local voluntary and community sector; and
- enable the national CVS network to collect and share monitoring and evaluation information in a comparable and consistent way to enable funders, government and NACVS to have comparative information.

A key function of voluntary and community sector organisations is to gather information for a variety of purposes, both internal and external. Increasingly, government at local and national levels expects the voluntary and community sector to be one of the prime deliverers of its social policy and social exclusion agenda. The information gathered by using the tools in this manual has a dual purpose. Firstly, it enables the CVS membership and NACVS to assess their own effectiveness; secondly, it demonstrates this effectiveness to users, funders, and central and local government.

When linked to the results of the NACVS Shuttle Questionnaire, trends and statistics give an extremely valuable insight into the ways in which CVS are contributing to the government's social inclusion agenda across England.

For example:

**> Tool 3**, *Service user feedback on development support*, will indicate how much extra money has been brought into the local voluntary and community sector through CVS support to local groups. This gives evidence of the added value of a CVS.

**> Tool 5**, *Enquiries monitoring form,* shows how effective a CVS is in responding to enquiries from its users.

**> Tool 8**, *Example quarterly report on liaison and collaboration*, gives statistical evidence of the numbers of policy and/or planning consultations CVS are involved with. There would be a remarkable impact if these statistics reflected the work of the whole of the CVS network!

When CVS use these tools to monitor and evaluate their work, the evidence collected is also useful in other ways. Set against any quality system, information from the tools will help to identify quality indicators. NACVS is currently revising its membership criteria; the revised criteria will take account of the tools and the evidence gathered can be integrated into the process of re-/application for NACVS membership.

CVS have a great capacity for bringing about change in local communities and it is NACVS' role to promote the work of its members at a national level. In order for NACVS to do this, information needs to be collected in a comparable and consistent way across member CVS. NACVS can then present this information in such a way that central and local government will have hard, statistical evidence of the benefits of working closely with CVS.

# Monitoring and evaluation tools

# Monitoring and evaluation tools

This section provides a range of tools that you can refer to for guidance or modify and use to suit your information needs. Some tools contain specific examples of structured questions whilst others offer more general guidance.

Copies of all the tools in this section are on the NACVS website: **http://www.nacvs.org.uk** You can download and amend them as required. Please contact NACVS for further details.

If you are using any of the tools to develop self-completion forms for your service users, you will need to ensure that they are presented appropriately. The tips below will help to ensure that you get a good response rate.

- Present your form well, paying attention to spacing, font size and layout. You want it to look pleasing rather than off-putting.
- Tell the service user why they are being asked these questions and what you will do with the answers. Provide clear instructions on how to complete the form.
- Construct questions so that they are easy to understand and easy to answer. The questions should be in a logical order.
- The whole questionnaire should take the service user only a few minutes – say about ten – to complete.
- Give clear instructions on what the service user should do with their completed forms.
- For postal returns, give out a freepost address to respondents or give them a stamped addressed envelope.
- Response rates can be improved by including an entry into a prize draw. You can offer donated prizes.
- Present your findings to the respondents. For example, write up the results of a newsletter survey as an article in your newsletter.

# Tool 1: Target group profile questions

When asking your service users to give you individual profile information, you should assure them of confidentiality and anonymity. Record and store individual profile information separately from the names and addresses of individuals.

**Examples of individual profile questions**

1. Are you
   - ☐ male
   - ☐ female

2. What is your ethnic group?[3]
*(please tick one box)*

**White**
- ☐ British
- ☐ Irish
- ☐ Other White background

**Black or Black British**
- ☐ Caribbean
- ☐ African
- ☐ Other Black background

**Asian or Asian British**
- ☐ Indian
- ☐ Pakistani
- ☐ Bangladeshi
- ☐ Other Asian background

**Mixed**
- ☐ White and Black Caribbean
- ☐ White and Black African
- ☐ White and Asian
- ☐ Other mixed background

**Other ethnic group**
- ☐ Chinese
- ☐ Vietnamese
- ☐ Other ethnic group

3. Do you consider yourself disabled? ☐ Yes ☐ No

If yes, please describe your disability ...........................................................................

4. How would you describe your sexuality?
☐ Heterosexual ☐ Lesbian ☐ Gay ☐ Bisexual

☐ Other, *please specify*..........................................................................................

5. Are you working for a voluntary or community organisation/group? ☐ Yes ☐ No

6. What is your involvement with your organisation/group?
☐ Paid staff member ☐ Management committee member

☐ Volunteer ☐ Other, *please specify*.....................................................................

**Examples of organisational profile questions**

7. How long ago was your organisation/group established?
☐ Less than 1 year ☐ 1–3 years ☐ 3–5 years ☐ over 5 years

8. Which geographical area does your organisation/group's work cover? *For this question, you can list your local areas and ask service users to tick all those that are applicable.*

(3)
The categories used are those from the updated national census. You should check with your local authority to see whether you need to include any additional categories applicable to locally-specific minority ethnic populations.

9. Does your organisation/group have a <u>specific remit</u> to work with any of the following groups? *(Tick all that apply)*

- ☐ Asylum seekers/refugees
- ☐ Black and ethnic minorities
- ☐ Families
- ☐ Disabled people
- ☐ Young people
- ☐ Women
- ☐ Carers
- ☐ Children
- ☐ Elderly people
- ☐ Gay/lesbian/bisexual
- ☐ Other, *please specify*..........................................................................................................

10. What was your organisation/group's <u>total income</u> during the last financial year, approximately?

- ☐ Don't know
- ☐ Up to £1K
- ☐ Over £1K and less than £5K
- ☐ Over £5K and less than £10K
- ☐ Over £10K and less than £50K
- ☐ Over £50K and less than £100K
- ☐ Over £100K and less than £250K
- ☐ £250K and over

11. How many people work in your organisation/group?

Paid full-time .......... Unpaid full-time ...........
Paid part-time .......... Unpaid part-time ...........

12. Is your organisation a member of the CVS?

☐ Yes ☐ No ☐ Don't know

**Some additional profile questions for members**

13. What is the organisation's current legal status?

- ☐ None
- ☐ Company limited by guarantee
- ☐ Registered charity
- ☐ Unincorporated association
- ☐ Other, *please specify*..........................................................................................................

14. Briefly describe the mission or main aim of your organisation

.......................................................................................................................................................

15. Which of the following areas of work does your organisation/group cover?

- ☐ Physical disabilities
- ☐ Drugs and alcohol
- ☐ Housing
- ☐ Mental health
- ☐ HIV and sexual health
- ☐ Education
- ☐ Learning disabilities
- ☐ Carers
- ☐ Arts and music
- ☐ Environmental
- ☐ Older people
- ☐ Sports/leisure
- ☐ Regeneration
- ☐ Youth
- ☐ Children/families
- ☐ Religious/cultural
- ☐ Black/ethnic minorities
- ☐ Training/consultancy
- ☐ Refugee/asylum seekers
- ☐ Organisational development/capacity building
- ☐ Other, *please specify*..........................................................................................................

16. Over the past year, what were your main funding sources?

- ☐ Local authority
- ☐ Health authority
- ☐ Trusts
- ☐ Community Fund
- ☐ European
- ☐ Private donation
- ☐ Other, *please specify*..........................................................................................................

# Tool 2: Agreement for one-to-one development support

Development workers can modify and complete Tool 2 and use it to serve different purposes – for example, to monitor their support sessions, agree actions that need to be taken, or simply to formally agree the nature of support with service users.

1. Name of CVS worker ……………………………………………….. Date……………….............

2. Name of group……………………………………… ID number……………………..............

3. Address…………………………………..………………………………….………………….............

4. Tel:………………………….……… Fax:…………….………
Email:……………...………..................

5. Name of key contact person/s Role in organisation

………………………………………….  …………………………………………...............

**Select and modify relevant profile questions from Tool 1 to include here.**

6. What will be the focus for development work?

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Charitable status**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Funding applications/sources**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Business plans**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Staff training**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Recruitment/employment issues**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Management committees**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Financial management/accounts**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Policies/procedures**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Liaison/collaboration**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Responding to community needs**

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

☐ **Other, please specify**……………………………………..

| Specify actions for CVS | Specify actions for group |
|---|---|
| Finish date ........./........./......... | Finish date ........./........./......... |

7. Work to be carried out from start date……./……/……….to end date……/……/……

8. Approximate hours of CVS staff time…………………………………………………

9. Signed on behalf of CVS:

Name………………………………Signature……………….…………Date …./……/….

10. Signed on behalf of the group:

Name………………………………Signature……………….…………Date …./……/….

# Tool 3: Service-user feedback on development support

If you have already used Tool 2 with the service user, you can avoid asking profile questions again in Tool 3 by simply marking both tools with an identity number exclusive to that service user. This means you can link the profile data you already have for each user to their feedback forms. It is unlikely that all the questions in Tool 3 will apply to every service user. You can tailor Tool 3 to each service user by selecting only those subject areas that you covered with them.

**Recently our CVS carried out some development work with you/your group. We would be very grateful if you could help us to improve our service by completing this form.**

(For office use only: ID No………)

| | Strongly agree | Agree | Neither | Disagree | Strongly disagree |
|---|---|---|---|---|---|
| **Section 1: Constitution** | | | | | |
| The support has helped me/us to clarify my/our aims and objectives | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support has helped to inform me/us of the need to have a legal written constitution | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we are now more clear about how to write a constitution | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we are now updating our constitution or have updated it | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 2: Charitable status** | | | | | |
| The support has helped to inform me/us about how to apply for charity registration | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we are now applying for or have obtained appropriate charity registration | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 3: Funding** | | | | | |
| The support has helped me/us to write better funding applications | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we am/are now more confident about writing funding applications without help | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support has made me/us more aware of how to gain access to different funding sources | ☐ | ☐ | ☐ | ☐ | ☐ |

I/we have obtained funding from new sources ☐ Yes ☐ No

If yes, please state amount £………………

State funding sources………………………………………………………………………...........

| | Strongly agree | Agree | Neither | Disagree | Strongly disagree |
|---|---|---|---|---|---|
| **Section 4: Business plans**<br>The support has improved my/our knowledge of writing business plans | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we am/are writing/have written a business plan | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 5: Staff training**<br>The support has made me/us more aware of staff training opportunities available | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we have taken up some staff training | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 6: Management committee**<br>The support made me/us better informed about management committee roles and responsibilities | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we now have a management committee or have improved my/our committee structure | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support helped me/us to improve the way my/our management committee functions | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 7: Financial/accounts**<br>The support has improved my/our knowledge of financial management and accounting | ☐ | ☐ | ☐ | ☐ | ☐ |
| As a result of the support I/we have improved the way I/we manage our finances | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support has helped me/us to access other financial/accounting services | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 8: Policies/procedures**<br>The support has helped me/us to identify what policies and procedures I/we need | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support has helped me/us to write or improve existing policies and procedures | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 9: Recruitment/employment**<br>The support has made me/us better informed about recruitment and employment issues | ☐ | ☐ | ☐ | ☐ | ☐ |

| | Strongly agree | Agree | Neither | Disagree | Strongly disagree |
|---|---|---|---|---|---|
| The support has given me/us a clearer idea of what employment policies/procedures I/we need | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we have been able to introduce or update my/our own employment policies and procedures | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 10: Liaison/collaboration** | | | | | |
| The support has made me/us more aware of local networks | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support has made me/us more aware of how to influence local policy planning bodies | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support has helped me/us to negotiate with my/our funders/purchasers | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we am/are more able to represent my/our organisation in consultations with other agencies | ☐ | ☐ | ☐ | ☐ | ☐ |
| The support has helped me/us to take part in partnership work with other agencies | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Section 11: General** | | | | | |
| The CVS carried out the work as agreed | ☐ | ☐ | ☐ | ☐ | ☐ |
| I/we am/are satisfied with the quality of the work | ☐ | ☐ | ☐ | ☐ | ☐ |
| The CVS worker responded well to my/our needs | ☐ | ☐ | ☐ | ☐ | ☐ |
| As a result I/we have improved my/our knowledge | ☐ | ☐ | ☐ | ☐ | ☐ |
| As a result I/we have improved my/our skills | ☐ | ☐ | ☐ | ☐ | ☐ |

Was there any support that you wanted but we were unable to provide? ☐ Yes ☐ No
If yes, what support did you want?

---

**Thank you. Please use the space below to add any comments.**

# Tool 4: Training feedback form

**We would be very grateful if you could help us to improve our training services by completing this form.**

Course.......................................................................................... Date......................

Venue......................................... Trainer's name........................................................

1. Please indicate whether you agree or disagree with these statements:
*(tick one box only for each statement)*

| | Strongly agree | Agree | Neither | Disagree | Strongly disagree |
|---|---|---|---|---|---|
| The course objectives were clear | ☐ | ☐ | ☐ | ☐ | ☐ |
| The course objectives were well met | ☐ | ☐ | ☐ | ☐ | ☐ |
| The course met my own expectations | ☐ | ☐ | ☐ | ☐ | ☐ |
| The presentations were clear and easy to understand | ☐ | ☐ | ☐ | ☐ | ☐ |
| The group work was useful | ☐ | ☐ | ☐ | ☐ | ☐ |
| The course materials are a useful record | ☐ | ☐ | ☐ | ☐ | ☐ |
| The trainer responded well to questions | ☐ | ☐ | ☐ | ☐ | ☐ |
| This course has helped me to develop my knowledge or understanding of the subject | ☐ | ☐ | ☐ | ☐ | ☐ |
| This course has helped me to improve my skills | ☐ | ☐ | ☐ | ☐ | ☐ |
| This course has given me confidence to apply my learning in my work/organisation | ☐ | ☐ | ☐ | ☐ | ☐ |
| The food served was appropriate to my dietary needs | ☐ | ☐ | ☐ | ☐ | ☐ |
| The venue was appropriate to my physical needs | ☐ | ☐ | ☐ | ☐ | ☐ |

2. Please comment on your scores

3. Please outline any further training or support you would be interested in

**Thank you for your time and cooperation**

# Tool 5: Enquiries monitoring form

The worker dealing with the subject of the enquiry should complete this form.

Date….../….../…… CVS worker dealing with subject of enquiry................................................

1. Enquirer's name..........................................................................................................................

2. Position
   - ☐ Paid staff
   - ☐ Management committee member
   - ☐ Volunteer
   - ☐ Other, please specify.........................................................................................

3. Organisation's name............................................................ CVS member? Yes ☐ No ☐

Address..............................................................................................................................

What was the enquiry about?

☐ CVS services, *please specify*

☐ General information/advice on:

| | Advice | Information |
|---|---|---|
| Constitution | ☐ | ☐ |
| Charitable status | ☐ | ☐ |
| Funding applications/sources | ☐ | ☐ |
| Business plans | ☐ | ☐ |
| Policies/procedures | ☐ | ☐ |
| Partnerships | ☐ | ☐ |
| Staff training | ☐ | ☐ |
| Recruitment/employment issues | ☐ | ☐ |
| Management committees | ☐ | ☐ |
| Financial management/accounts | ☐ | ☐ |
| Representation and consultation | ☐ | ☐ |

Other, please specify.........................................................................................

Were you able to provide the information requested? ☐ Yes ☐ No

Were you able to refer the enquirer to an outside agency/resource? ☐ Yes ☐ No

If yes, to whom did you refer the enquirer?..........................................................................

***Ask the enquirer these questions about their organisation:***

4. Is your organisation locally based, or does it provide services locally? ☐ Yes ☐ No

5. How long ago was the organisation established?

☐ Less than 1 year ☐ 1–3 years ☐ 3–5 years ☐ Over 5 years

6. How many people work in your organisation/group?

| | | | |
|---|---|---|---|
| Paid full-time | ........... | Unpaid full-time | ........... |
| Paid part-time | ........... | Unpaid part-time | ........... |

7. Does the organisation have a specific remit to work with any of the following groups? *(Tick all that apply)*

| | | |
|---|---|---|
| ☐ Asylum seekers/refugees | ☐ Black and ethnic minorities | ☐ Families |
| ☐ Disabled people | ☐ Young people | ☐ Women |
| ☐ Carers | ☐ Children | ☐ Elderly people |
| ☐ Gay/lesbian/bisexual | ☐ Other, please specify........................................ | |

**Enquiries: follow-up feedback**

- After using the Enquiries Monitoring Form, you can select a sample of completed forms and post a feedback form to the enquirers. See the example below.
- Send this form only to those enquirers whom you have referred to outside agencies/persons.
- Send the form 1–2 weeks after the date on which you dealt with the enquirer.
- Tell the enquirer to post back the completed form by a specified date.

---

Dear Mr/Ms…………………..............................

On …./…./…. you called our enquiry service for information about…………………….…..........

……………………………………………………………………………………………….............

In our response we suggested you make contact with…………………………………….…...........

……………………………………………………………………………………………….….........

1. Have you been able to contact the above person/agency/resource? Yes ☐ No ☐

2. Do you intend to make contact with them in future? Yes ☐ No ☐ Maybe ☐

3. Please give us details of any difficulties you experienced in making contact

…………………………………………………………………………………………….................

…………………………………………………………………………………………….................

4. How many times have you used the CVS as a source of information in the last month?
☐ Once only ☐ 2–3 ☐ 4–5 ☐ More than 5 times

5. How important is it to you that the CVS is able to offer an enquiry/information service?
☐ Very important ☐ Important ☐ Not very important ☐ Unimportant

6. How valuable is the enquiry/information service in enabling you/your organisation to carry out its work?
☐ Very valuable ☐ Valuable ☐ Not very valuable ☐ Non-valuable

7. Please add any other comments about the CVS

………………………………………………………………………………………………..

………………………………………………………………………………………………

**Thank you for your time and cooperation**

# Tool 6: Practical facilities monitoring form

**Please help us to improve our services by completing this form before you leave the CVS**

1. Name of your organisation/group..........................................................................................

2. During your visit today, do you intend to use any of the facilities listed below?
☐ Yes (if so, please complete this form and return it to reception before you leave)
☐ No (if so, please return this form to reception)

3. What is the reason for your visit today?
*Tick all that apply*

| | | |
|---|---|---|
| ☐ **Library** | Did you find the information you were looking for? | ☐ Yes ☐ No |
| ☐ **Enquiry** | Did you receive information/advice relevant to your enquiry? | ☐ Yes ☐ No |
| ☐ **Fax** | Were you able to send your fax successfully? | ☐ Yes ☐ No |
| ☐ **Copier** | Were you able to make the copies you needed? | ☐ Yes ☐ No |
| ☐ **Computer** | Were you able to use the functions/packages you required? | ☐ Yes ☐ No |
| ☐ **Rooms** | Did the room meet your requirements? | ☐ Yes ☐ No |

4. If you answered NO to any of the above, please describe the difficulties you experienced.

..........................................................................................................................................

5. How long ago was your voluntary/community organisation established?
☐ Less than 1 year ☐ 1–3 years ☐ 3–5 years ☐ Over 5 years

6. What is your role in the organisation? ☐ Paid staff ☐ Trustee ☐ Volunteer
☐ Other, please specify.........................................................

7. How many people work in your organisation/group?
Paid full-time ........... Unpaid full-time ...........
Paid part-time ........... Unpaid part-time ...........

8. Does your organisation have a specific remit to work with any of the following groups?
*(Tick all that apply)*

☐ Asylum seekers/refugees ☐ Black and ethnic minorities ☐ Families
☐ Disabled people ☐ Young people ☐ Women
☐ Carers ☐ Children ☐ Elderly people

☐ Gay/lesbian/bisexual ☐ Other, please specify.......................................

9. How many times have you/your organisation used these services in the last month?

| | Never | Once | 2-3 | 4-5 | More than 5 |
|---|---|---|---|---|---|
| Library | ☐ | ☐ | ☐ | ☐ | ☐ |
| Rooms | ☐ | ☐ | ☐ | ☐ | ☐ |
| Fax machine | ☐ | ☐ | ☐ | ☐ | ☐ |
| Computers | ☐ | ☐ | ☐ | ☐ | ☐ |
| Photocopier | ☐ | ☐ | ☐ | ☐ | ☐ |
| Enquiry/advice service | ☐ | ☐ | ☐ | ☐ | ☐ |

10. How <u>important</u> is it to you/your organisation that the CVS is able to offer the following services?

| | Very important | Important | Low important | Not important at all |
|---|---|---|---|---|
| Library | ☐ | ☐ | ☐ | ☐ |
| Rooms | ☐ | ☐ | ☐ | ☐ |
| Fax machine | ☐ | ☐ | ☐ | ☐ |
| Computers | ☐ | ☐ | ☐ | ☐ |
| Photocopier | ☐ | ☐ | ☐ | ☐ |
| Enquiry/advice service | ☐ | ☐ | ☐ | ☐ |

11. How <u>valuable</u> are these services in supporting the work you/your organisation carries out?

| | Very valuable | Valuable | Slightly valuable | Not valuable at all |
|---|---|---|---|---|
| Library | ☐ | ☐ | ☐ | ☐ |
| Rooms | ☐ | ☐ | ☐ | ☐ |
| Fax machine | ☐ | ☐ | ☐ | ☐ |
| Computers | ☐ | ☐ | ☐ | ☐ |
| Photocopier | ☐ | ☐ | ☐ | ☐ |
| Enquiry/advice service | ☐ | ☐ | ☐ | ☐ |

12. How did you find out about the above CVS services?

- ☐ Through work colleagues
- ☐ Through the CVS
- ☐ Other, please specify..................................................................................

13. Did you experience any difficulties getting to the CVS offices? ☐ Yes ☐ No
If yes, what difficulties did you have?

......................................................................................................................

14. If the CVS were unable to offer you these services, how would this affect you and your organisation/group?

......................................................................................................................

15. Any other comments?......................................................................................

**Thank you for your time and cooperation. Please return your completed form to reception before you leave.**

# Tool 7: Membership survey questions

**1. Profile questions**

If you do not have the profile details of members that you will need for the survey, you can select and modify questions from Tool 1. If you already have these details on your membership database then you don't have to ask profile questions again. However, it is best to allocate an identity number to each member and add this to the membership survey questionnaire. In this way you will be able to identify which members have completed the questionnaires and can refer to their profile details as necessary.

**2. Example question on knowledge and value of CVS services**

- Please indicate whether you know about and *have used* the following services provided by the CVS.
- For each service that you *have used,* give a score for how valuable that service was for you/your organisation. 1 = not valuable at all; 2 = not very valuable; 3 = valuable; 4 = very valuable.

| Service | Know about | Have used | Value score |
|---|---|---|---|
| Training | ☐ | ☐ | ............ |
| Development support | ☐ | ☐ | ............ |
| Network events | ☐ | ☐ | ............ |
| Enquiry service | ☐ | ☐ | ............ |
| Library | ☐ | ☐ | ............ |
| Computer access | ☐ | ☐ | ............ |
| Newsletter | ☐ | ☐ | ............ |
| Room hire | ☐ | ☐ | ............ |
| Others (list) | | | |

**3. Example questions on capacity**

- Select and modify questions on legal status, annual income, funding sources and staffing levels from Tool 1.
- Please indicate which policies and procedures your organisation has in place:
  ☐ Recruitment and employment
  ☐ Health and safety
  ☐ Staff induction and supervision
  ☐ Equal opportunities

You can list a number of other policies and procedures for respondents to tick.

- You may want to ask other questions on good practice to indicate the development of organisations.

**4. Example questions on liaison and collaboration**

- Your CVS can identify and list the key policy and planning bodies relevant to your local area and ask members whether they have been represented on them.

- In relation to service provision and development, is your organisation working collaboratively with or in partnership with any of the following agencies?

  ☐ Other voluntary organisations and community groups
  ☐ Local authority
  ☐ Health authority
  ☐ Education authority
  ☐ LSCs
  ☐ Private sector companies
  ☐ Other, please specify……………………………………………………………..

- Have any of these collaborations/partnerships generated any additional income for your organisation?
  ☐ No
  ☐ Yes: please enter amount £………………………………………

- What do you see as the main benefits of collaboration/partnership work for your organisation?

  ……………………………………………………………………………………………

  ……………………………………………………………………………………………

- What do you see as the main difficulties?

  ……………………………………………………………………………………………

  ……………………………………………………………………………………………

- Is your organisation represented on any networks of voluntary organisations and community groups?
  ☐ No
  ☐ Yes (please give the name of the network)……………………………..

# Tool 8: Example quarterly report on liaison and collaboration

**First quarter January to end of March**

Staff member/team.........................

**1. Network events**

| Subject area and purpose of CVS involvement | Number organised | Number of groups attending |
|---|---|---|
| | | |
| | | |

**2. Consultations with key policy/planning bodies**

| Name of key body and purpose of CVS involvement | Number of consultations | Number of groups supported |
|---|---|---|
| | | |
| | | |

**3. Meetings with public sector**

| Subject area and purpose of CVS involvement | Agency name | Number of meetings |
|---|---|---|
| | | |
| | | |

**4. Meetings with private sector**

| Subject area and purpose of CVS involvement | Agency name | Number of meetings |
|---|---|---|
| | | |
| | | |

### 5. Written information distributed

| Name of resource and subject area | Number of copies | Number of groups | How distributed |
|---|---|---|---|
| | | | |
| | | | |

# Tool 9: Newsletter evaluation

An evaluation of the CVS newsletter can be carried out using a combination of simple record keeping, analysis of content and a survey based on a self-completed questionnaire.

First, you will need to identify output indicators for the newsletter, such as:

- Number of issues per year
- Numbers distributed and to which type of agency
- Readership numbers
- Subject areas covered
- Design quality
- Relevance of topics
- Number and source of inserts
- Total income generated
- Total cost and cost per issue

Then you will need to decide how best to collect this information. By keeping simple records, analysing the content of past newsletters and examining your mailing list, you can collect most of it.

Before deciding which questions to ask in a survey, you need to identify expected outcomes. For example, the newsletter may make voluntary organisations and community groups more aware of:

- CVS services and other sources of information and support;
- funding opportunities; and
- local and national developments.

Identifying outcomes will help you to identify the key questions that you should ask your readership. Take care to construct questions that will be easy for your readership to answer and provide you with the information you need.

Keep the questionnaire fairly short, for example two sides of A4 paper, and try to use closed questions with tick-box options, keeping open-ended questions to a minimum. There are some example questions overleaf that you may wish to include.

Questionnaires can be sent out with the newsletter. The response rate can be improved by using a freepost address or including a stamped addressed envelope. Some CVS have found that response rates improve if the survey is promoted by offering an entry into a prize draw with donated prizes.

**Example newsletter survey questions**

1. How often do you read the newsletter?
☐ Every issue ☐ Most issues ☐ Some issues

2. Which sections of the newsletter do you read most frequently?

......................................................................................................

3. Do you circulate your copy of the newsletter to other people in your organisation?
Yes ☐ No ☐

If yes, approximately how many other people read it?
☐ 1 or 2 ☐ 3–6 ☐ 7–10 ☐ 10 or more

4. How useful do you find the newsletter in keeping up-to-date with information on the following?

| | Very Useful | Useful | Not Useful |
|---|---|---|---|
| Local news | ☐ | ☐ | ☐ |
| National news | ☐ | ☐ | ☐ |
| Funding opportunities | ☐ | ☐ | ☐ |
| Training opportunities | ☐ | ☐ | ☐ |
| Health and social care issues | ☐ | ☐ | ☐ |
| CVS services and activities | ☐ | ☐ | ☐ |
| Good practice issues | ☐ | ☐ | ☐ |
| Services/advice for small groups | ☐ | ☐ | ☐ |

5. Have you used the newsletter to insert information about your own organisation?
Yes ☐ No ☐

6. We are happy for organisations to reproduce newsletter items to circulate to other agencies or include items in their own newsletters. Have you reproduced any items?
Yes ☐ No ☐

7. How would you rate the quality of writing in the newsletter?
☐ Very good ☐ Good ☐ Average ☐ Poor ☐ Very poor

8. Please indicate whether you agree or disagree with the following statements about the newsletter.

| | Agree strongly | Agree | Unsure | Disagree | Disagree strongly |
|---|---|---|---|---|---|
| It covers a good balance of topics | ☐ | ☐ | ☐ | ☐ | ☐ |
| It is easy to read | ☐ | ☐ | ☐ | ☐ | ☐ |
| The articles are too long | ☐ | ☐ | ☐ | ☐ | ☐ |
| The design needs to be updated | ☐ | ☐ | ☐ | ☐ | ☐ |
| The inserts are interesting | ☐ | ☐ | ☐ | ☐ | ☐ |
| It should be produced more often | ☐ | ☐ | ☐ | ☐ | ☐ |

**Select and modify profile questions from Tool 1 to include in the survey.**

# Tool 10: Participatory evaluation methods

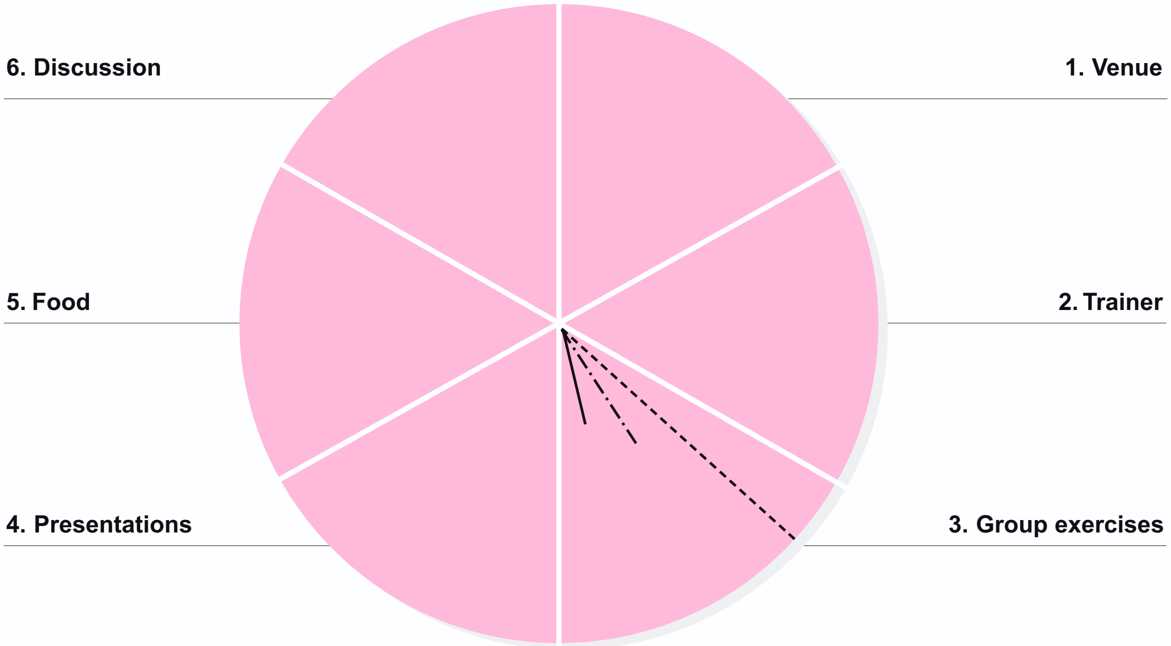
### Participatory methods

Participatory methods can be used in place of, or alongside, written feedback forms. They can be a rich source of feedback that can provide detailed information, for example on how the quality of a group event can be improved.

The disadvantages are that participatory methods take longer to carry out than written evaluation methods, and the results are more difficult to analyse and compare across different group events. Two methods are described below. Bear in mind that these are best used when you require more detailed feedback about a specific group event. The examples given below are for training, but you can modify them to apply to other group events.

### Evaluation wheel

- Draw a large circle on the flip chart and divide it into 4–6 sections.




- Identify 4–6 specific aspects of the course about which you require feedback. These can be determined by the trainer, or the trainer can ask the group to suggest which aspects they wish to comment on. Write these aspects or statements against each numbered section outside the circle, as shown in the diagram above.
- Using differently-coloured pens, ask each participant to draw one line in each section from the middle of the circle towards the outer edge, as shown in Section 3 above. The length of the line should indicate how satisfied they are with that aspect of the course, with a shorter line indicating less satisfaction than a longer line. The trainer can leave the room while participants complete each section.
- The trainer then examines each section and facilitates a group discussion on which aspects of the course participants were most and least satisfied with, drawing out of the discussion how each aspect of the course can be improved further.

**User-led group evaluation**

- In a user-led group evaluation, the basic principle is to allow the group to take control over the whole process of evaluating the training course.
- The trainer tells the group that they are in control of the course evaluation and asks them to identify 4–6 evaluation questions or criteria that will help them to judge whether the course was successful.
- The trainer writes each of the suggested evaluation questions/criteria on A4 sheets of paper, one question per sheet, and pins them up on the wall.
- The trainer then gives a Post-it notepad to each participant, and asks them to consider each question. Their responses are written on Post-its and stuck onto the appropriate A4 sheet. Each participant writes at least one response to each of the questions.
- The trainer splits the group into pairs or small groups, giving each group one of the A4 sheets containing the responses. The trainer then asks the groups to examine the responses and summarise them. Participants are asked to interpret the responses and make recommendations to the trainer on how the course could be improved, based on the responses they examined.
- Each group then presents their analysis and recommendations, inviting any additional responses or points for discussion from other participants.

**There are many other participatory approaches; contact CES for further details.**

# Tool 11: Guidance on interviews

## Sampling

Interviews are time-consuming and it is not possible to interview all your service users, so you will need to select a sample of service users. A statistically random sample is only necessary if you intend to conduct statistical analysis tests on the data; you are very unlikely to need a random sample for interviews. Most of the time, interview respondents are purposively selected – that is, they are likely to provide the information that is needed.

In order to ensure that the sample you pick is broadly reflective of your service users as a whole, you will need to identify the main characteristics you want to see reflected in the sample. For example, if you know that 60% of your service users are small organisations, or that 20% are Black and minority ethnic organisations, you will select your sample accordingly to reflect these proportions. Alternatively, you might want to have a sample size of 20, and split the sample equally into ten small organisations and ten larger ones.

In relation to sample size, there are no hard and fast rules except that the larger, the better. Generally speaking, pick the sample size that serves your purposes, which you can reasonably manage.

## General guidance on conducting interviews

- Interviews can be conducted face-to-face or over the telephone. You will need to decide which method is most appropriate for you and your service users.
- Decide how many interviews to carry out and with whom. Decide who will carry out the interviews, how many each interviewer will carry out and over what time period.
- Review the information you already have and decide what specific information you need from the interviews. For example, with training course participants you may want to collect information on the following broad questions:
  - What do you feel you learnt from the course?
  - How have you used your learning in your work?
  - What difficulties have you experienced in applying your learning?
  - How has your learning benefited your work and your organisation? Can you give some examples? **Don't forget to include key profile questions.**
- Decide how to phrase questions to get the information you want. Focus the questions on the information you need. You may need alternative ways of asking the same question in case respondents ask you to re-phrase it. This is particularly important if several different interviewers carry out the interviews. It will ensure that interviewers continue to ask questions in a similar way, thereby ensuring that the responses are comparable.

- Construct an interview schedule detailing the questions and the order in which they should be asked. The schedule should also detail the information given to the respondent. For example, it will tell them what the interview is for, how the information will be used, assure them of confidentiality, and ask for explicit permission to carry out the interview.
- You may want to record responses in writing, or you can use a tape recorder. Get explicit permission from respondents to use the tape recorder. Bear in mind that although this records all the information, it means extra work in terms of transcribing and extracting the information you need.
- Keep your interviews fairly short. Most interviews can be conducted relatively easily in 15 to 30 minutes.
- Ask potential respondents whether they are willing to participate and whether it is convenient to carry out the interview (if not, arrange a mutually convenient time).
- Do a few pilot interviews, or treat the first few interviews as a pilot run, to ensure that the timing is right, the questions work well, and that you are getting useful responses. Make any modifications that are necessary before continuing.

# Tool 12: Guidance on case studies

The case study method is a good way to discover and illustrate the process by which something was achieved over time. For example, you might want to know how the use of CVS services benefits organisations in the longer term in terms of improving their capacity and quality.

By their very nature, case studies are selective. This means that you need to select the process you want to examine and select the most appropriate organisation/s to illustrate it. For example, if you are interested in examining the development of the organisations that your CVS works with, you should choose an organisation that you have worked with and know has successfully developed over time. Alternatively, you might want to find out why something did not work. In this case, you should select an organisation that you know had some concerns or complaints about the CVS.

There are no rules about the number of case studies you should carry out; it depends on how many you need. A single case study might be sufficient, or you might need more. For example, you might want to illustrate a process undertaken by a new organisation and contrast this with a case study of a more established organisation. The number of case studies you conduct is largely irrelevant, as the data provided are qualitative rather than numerical.

**The basic structure of a case study** examining the development of an organisation would include the following.

- Description of the organisation and its profile details, how it knew about the CVS and made contact.
- Description of the organisation's development support needs on first contact/s with the CVS.
- Description of how the CVS and the organisation worked together to address these needs. This will include the priorities set and the nature of the work that was carried out by the CVS and the organisation.
- Description of the progress of the organisation over time, and achievement and milestones along the way that are connected to the work that was carried out with the CVS.
- Summary of how the organisation has benefited and changes that have occurred. This will include a comparison between the state of the organisation when it first contacted the CVS and its state now.
- Wherever possible, include direct quotes from the organisation to illustrate what it feels have been the benefits and value of working with the CVS.
- Comments from the CVS perspective on which aspects of the case study are applicable to other service users and what worked particularly well for the organisation described.

# Tool 13: Guidance on evaluating process

CVS are frequently involved in different issue-based and client-based forums. The processes by which these forums carry out their work can be just as important as what they achieve. Indeed, process and outcome are frequently interrelated.

It can be difficult to evaluate the specific CVS role within a forum. Forums are, by definition, collective endeavours. A CVS might believe itself to be the lead agency or driving force, but other members might not share this perspective. Evaluating process is usually best done by an independent evaluator rather than by those involved in the process, especially if the link between process and outcome is being examined.

Nevertheless, feedback from members about the process of the forum as a whole can be useful for making improvements. This tool provides some guidance on how a CVS might gather feedback from members and how such feedback can be integrated into the activities of the forum.

First, identify some process indicators. The following are examples.

- Quality of administration
- Number of invitations sent and levels of attendance
- Range of organisations invited and attending
- Degree of shared understanding of forum's purpose
- Extent and degree of understanding of members' individual roles
- Degree to which members have an opportunity to contribute
- Clarity of the agenda
- Effectiveness of chairing/facilitation
- Degree to which members share responsibility for decisions and actions of the forum

Next, prioritise the indicators you wish to measure and work out the information you need to record. For example, you can keep a simple record of the number of invitations sent out and to whom, together with a register of attendance. You will then need to identify the information you require from forum members and construct some questions to ask them.

**Examples:**

| | |
|---|---|
| Indicator: | Quality of administration. |
| Questions: | Did you receive enough notice of the meeting?<br>Were the pre-meeting papers you received useful?<br>Have you experienced any difficulties in making contact with/working with the forum administrator?<br>How suitable is the forum venue to your needs? |
| Indicator: | Effectiveness of chairing/facilitation. |
| Questions: | Is the current chair/facilitator the most appropriate person/agency to carry out this role?<br>Does the chair/facilitator ensure there is a clear agenda for each meeting?<br>Does the chair/facilitator manage the meeting in such a way that agenda items are discussed? |

Next, you will need to select the methods that you will use to put the questions. You could ask about the quality of administration in an open meeting, but other questions require a more sensitive approach. For example, questions about the chair/facilitation of meetings are best done through a short self-completed questionnaire with tick-box options, or through short, informal telephone interviews.

It can be helpful for forum members to broadly agree on who will collect the information, or generally attend to the process of the forum, as this can aid cooperation and trust in the findings. Attending to the process should run alongside other forum activities. It can be helpful to make regular agenda items that briefly address questions such as:

- Are members happy with the current composition of the forum?
- Are there any other persons/agencies that should be invited to future meetings?
- How can we involve new members appropriately?

Choose the most appropriate and useful times to collect different pieces of information. For example, questions about the quality of the administration are best collected when a forum is meeting for the first time or when a new member joins, as this can help to ensure smoother administration later on in the forum's activities. In contrast, it might be more appropriate to gather questions about the effectiveness of the chair/facilitator after the forum has met a few times.

It is important that any findings relating to the forum are discussed at forum meetings so that any related decisions can be made.

# Tool 14: Guidance on analysing questionnaires

There is a range of database packages that you can use for storing and analysing data; the most commonly used are Microsoft Excel and SPSS. These packages enable you to generate statistics, tables and charts readily. Excel should fulfil most, if not all, of your data analysis needs. You are unlikely to need more sophisticated statistical analysis, but if you feel you do, SPSS should be suitable.

Whether you intend to analyse your questionnaires by hand or using an electronic database, this tool provides some useful guidance on how to prepare your questionnaires for analysis.

**Preparing questionnaires for entry onto a database**

Before beginning data entry, it is important to familiarise yourself with your database package and work through the introductory tutorials that come with it. You will also need to do the following things:

- Collect all your questionnaires and number them in numerical order. Ensure that each record number on the database matches the questionnaire number. This makes it easy to check that a questionnaire has been entered correctly.

- Using a blank questionnaire, decide which answers need to be entered as numerical data and which need to be entered as text. This will help you to design your database structure.

- Assign numerical codes to answers and keep a record of them to refer to if needed. For example: Yes = 1, No = 2.

- If respondents have been asked to tick whether they agree or disagree with a statement, you can assign the following codes:

  1 = Strongly disagree
  2 = Disagree
  3 = Undecided
  4 = Agree
  5 = Strongly agree

- Where respondents can tick more than one answer, you can design your database so that it lists each of the answers. Use 1 = Yes if they ticked that answer, and 2 = No if they did not tick it.

- You will also need a numerical code to indicate missing data. Missing data is where the respondent has not answered a question or where you cannot accurately read the response. It is useful to give missing data the code -9. The negative value means that most databases will automatically ignore these when generating total counts and frequencies.

- When you have entered all your questionnaires, you will need to do some data cleaning to check for errors. Randomly select, say, every tenth questionnaire and check that it has been entered correctly. Look for common errors and decide how best to rectify them.

**Analysing questionnaires manually**

A team approach can be used to make analysing by hand more efficient. Each team member can take responsibility for analysing a few questions, and they can come together to pool the results.

- Count all the questionnaires to give a total number of respondents.
- Sort the questionnaires into different piles according to the answer categories: for example, one pile of 'Yes' answers and another for 'No'.
- Count and keep a record of the totals for each answer on a blank questionnaire.
- Always count and record the number of respondents who have answered a question, because this may not be the same as the total number of respondents.
- For numerical answers, you might want to find out the average for the whole sample; for example, 'Number of full-time staff'. Sort all the answers into ascending order, starting with the lowest level of reported staffing. Pick out the middle answer; this gives the median number of full-time staff for your sample. If you have two different answers in the middle, add them together and divide by two to give you the median.
- If you asked respondents to give a rating out of ten, it is best to calculate the median score and present this as the average score for the sample.
- The median score is usually a more accurate average than the mean score (you calculate the mean by adding up all the numbers then dividing the total by the number of people in the sample). The mean is usually much more sensitive to any unusually low or high scores in the sample and therefore may give a skewed average score.
- Sometimes it is useful to present the mode as the average. 'Mode' is the most common response to a question. It is particularly useful for analysing data from open-ended questions. For example, you might have a question such as 'What aspect of the workshop did you find most useful?', which respondents have to answer in their own words. To work out the mode, look at all the responses and sort them, putting similar responses together. This will allow you to identify which aspects were mentioned most frequently.

# Tool 15: Guidance on written reports

There will be occasions on which you might need to bring together the information you have been collecting in a written report. Such a report might be used to plan next year's services, obtain funding or inform others of your work. Reports also serve as permanent records of your monitoring and evaluation activities and are invaluable sources for future reference. The guidance below provides some key pointers on putting together a written report.

**Know your audience**

- Plan according to the timetable for the report and the purposes for which it is designed. If you know who will read it and what it will be used for, you can write the report with your audience in mind. A report written for an internal service review will be very different from a report submitted to potential funders. Report discriminatingly and appropriately, according to your audience. Think about what you want to tell them and what they might want to know. You might decide that you need several short reports rather than one full one.

**Objectives and outputs**

- Start by stating your objective: for example, 'hosting and providing training events'. Explain to your audience why this provision is important and any particular methods approaches or values that inform the way you carry it out.

- Next, provide summaries of the information about your outputs: for example, the number of courses organised within a given period of time; courses that ran according to plan; subject areas; accredited courses; course directors; course advertising. Interpret the data for your audience. Explain what the information means in terms of how busy your service is and how good the range of outputs are, and list your successes along with points for improvement.

- Summarise the profile data on your service users – for example, those who attended the training courses. It is important to summarise key data rather than present all the results for each of the questions you asked them. Analyse the information with the intention of making short statements about the total number of service users and their characteristics, such as gender, type of organisation and so on, which can be expressed as percentages.

- Interpret the results for your audience. Describe what the findings indicate to you about how well you are reaching your target group. Outline any implications for your work. For example, does the service need to encourage particular groups of users to come forwards? How might this be best achieved?

- Summarise service-user feedback on the quality of the service. (You don't need to present outcome data yet.) This is a good opportunity to present direct quotes from service users to represent positive and negative feedback. Interpret these for the audience, commenting on any implications for improving service provision.

### Aims and outcomes

- State your aim – for example, 'to improve capacity and quality'. Explain why this aim is worthwhile, and whether its achievement would help to address the needs of your target group.
- Begin by reporting generally on which outcomes you have measured and the methods you have used. Where possible, explain your choice of methods to your audience and explain how you might have worked if you had had greater resources.
- Provide a summary of your outcome data. These might consist of service-user feed back about the general or immediate value of the service – for example, an increase in their knowledge, skills and confidence.
- If you have gathered follow-up data on service users through interviews or case studies, present them here. Summarise the data to give an overall picture and then present some detailed examples.
- Interpret the data for your audience. Tell them how effective your service is in meeting its aims.

### Resources and costs

- List the resources that were used in delivering the service. For example, for training this would include administration time, venues, trainer fees, catering, training equipment and so on. Give approximate costs for each and work out a total cost for running the service over the time period on which you are reporting.
- You can go a step further and work out an approximate cost-per-service-user by dividing the total cost by the number of service users.
- If you wish to say something about the efficiency of your service, you can divide the total cost by <u>only</u> <u>those</u> service users who experienced the intended outcome, for example those training participants who said their skills, confidence and/or knowledge had increased. This will give you a cost-per-outcome-achieved.

### Recommendations for action

Finally, make <u>key</u> recommendations for improving the service, based on information in the report.

# Measuring effectiveness: monitoring and evaluation tools grid

| AREAS / TOOLS | Target group profile | Improving capacity and quality | Improving access to information, practical support services and facilities | Facilitating liaison and collaboration | Identifying & responding to community needs |
|---|---|---|---|---|---|
| Tool 1 | ✔ | ✔ | ✔ | ✔ | ✔ |
| Tool 2 | | ✔ | | | ✔ |
| Tool 3 | | ✔ | | ✔ | ✔ |
| Tool 4 | | ✔ | | ✔ | |
| Tool 5 | | | ✔ | | |
| Tool 6 | | | ✔ | | |
| Tool 7 | | ✔ | ✔ | ✔ | |
| Tool 8 | | | | ✔ | |
| Tool 9 | | | ✔ | | |
| Tool 10 | | ✔ | | ✔ | |
| Tool 11 | | ✔ | | | ✔ |
| Tool 12 | | ✔ | ✔ | | |
| Tool 13 | | | | ✔ | ✔ |
| Tool 14 | | ✔ | ✔ | ✔ | |
| Tool 15 | | ✔ | ✔ | | ✔ |