

## **Fact sheet 6: How do I evaluate my project or service?**

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This fact sheet aims to give you information to help you to understand:

- Different types of evaluation;
- When to think about evaluation; and
- Step by step guidelines on how to approach the evaluation of your project/service.

It will also provide links to other useful fact sheets and documents that relate to evaluation.

### **1. Types of evaluation**

There are different approaches to, and types of, evaluation. Roberts, Cavill and Rutter (2009) define these different types of evaluation as formative, process and impact/outcome:

- **Formative evaluation** starts during a project's development stages and uses theory to develop and plan the project's components, development and pilot testing. It informs the direction a project will take. Pre or pilot testing is a type of formative evaluation and involves trying out some of a project's parts before it is launched in full. It assesses a project's relevance to identified problems, and the practicality of different intervention methods.
- **Process evaluation**, also known as implementation evaluation, begins at the start of a project. It assesses implementation and delivery, and identifies factors and conditions relating to how a project is being implemented. It aims to see why a project does or does not meet its aims and objectives, and can show whether the project deviated from the original plan.
- **Impact/outcome evaluation** focuses on whether a project met its aims and objectives. This might be in terms of health outcomes, such as a reduction in obesity, or impacts on health behaviours such as increased physical activity or better nutrition or other impacts on users such as increased confidence and self esteem.

Formative, process and impact/outcome evaluations seek to answer different types of question about the project. None is superior to the others. Rather, they complement each other and, in practice, service evaluation often covers aspects of each. In deciding what type of evaluation to do, the definition of your evaluation questions and aims are important (see section 3 below).

### **2. Planning evaluation**

Evaluation is an integral part of your project or service. Project evaluation enables a demonstration of the actual value of the project and you should plan for evaluation at the outset, at the project initiation or planning stage. Ideally evaluation should be costed and resourced as part of the service implementation, with 10% of a project's resources allocated to it, rather than perceived as an additional, add-on stage. Without a planned evaluation, it will be difficult to measure the success or otherwise of a project and justify its continued support. Although the assessment of whether the headline objectives of a project have actually been met are crucial, several other aspects of a project may be useful to evaluate (e.g. Was it cost-effective? Did the intervention reach the intended users? Was the delivery acceptable to patients?)

Considering evaluation in the early stages of service development enables:

- the incorporation of evaluation activity into the budget;
- the gathering of baseline data to compare and assess the impact of the initiative/intervention;
- development of evaluation approaches that assess the desired/planned outcomes of a service rather than assessing only those that are available through an already running service model; and
- determination of information and monitoring requirements, and who is going to provide this/where this is going to come from.

However, it is never too late to develop an evaluation project for an existing service. When planning evaluation you need to ensure that the project or service you are designing has clear and measurable objectives. This will then help you to set the objectives of your evaluation.

It is also necessary to ensure that accurate monitoring information is being collected for your service in order to demonstrate its performance. These data will form an essential component of the evaluation and therefore the future of your project or service. Baseline data that already exist or that are collected at the outset of a project or service will be useful to compare against future data, to see if it has made a difference.

### **3. Approaching evaluation**

The following step by step guide aims to guide you through the process of incorporating evaluation into your project. The steps are linked and allow a narrowing of your evaluation ideas into a deliverable project

#### **Step 1: What do you want to evaluate?**

When planning an evaluation, the first step is to identify which aspects of the project you want to evaluate, and what you can feasibly incorporate. Which aspect(s) have highest priority: value for money, effectiveness, appropriateness, acceptability, equity, efficiency or sustainability?

#### **Step 2: What is/are the service-specific evaluation questions arising from step 1?**

Defining the scope further, what questions do you want the evaluation to answer? Your evaluation questions may include:

- Has the project delivered value for money?
- Does the project meet the needs of users/patients/clients/public?
- Does the project reach the relevant users/patients/clients/public?
- How far have the intended outcomes been achieved?
- Were there any unintended outcomes as a result of this project?
- Is the project sustainable?
- How can the project be improved?
- How do the costs and benefits of the project compare?

#### **Step 3: Evaluation aims**

The aims of the evaluation will arise directly from the questions defined and probably also be informed by the aims of the service or project being evaluated, e.g.:

- To explore the impact of an intervention on the target population; or
- To assess any change in behavior before and after a new service is available; or
- To assess the effect of the service on unplanned admissions amongst the 16-18 years age group.

#### **Step 4: Evaluation Objectives**

Now specify your evaluation objectives i.e. what do you need to find out that will answer whether the evaluation aim has been met? How will you answer your evaluation questions? e.g.:

- Establish the proportion of service users from the target population; or
- Compare the number of admissions among the key age group before and after service implementation.

Are the objectives SMART (specific, measurable, achievable, realistic, timely)?

- Do they specify what you want to achieve?
- Will you be able to measure whether or not the objectives are being met?
- Is the project going to be able to achieve these objectives? Are they attainable?
- Can they be realistically achieved with the resources you have available?
- When should the objectives be met? Have you set a timescale?

### **Step 5: Who is the evaluation for?**

To further clarify how you will proceed with the evaluation, it may be helpful to consider the key audiences for whom the evaluation information is to be collected. Has the evaluation been commissioned for a specific purpose? Is there a business case to be made to funders of the service? Or is the main impetus one of demonstrating the benefit of the service to other potential users? The focus of your evaluation may differ depending upon whether you are presenting the results to those who use the service or those who fund the service. Social care stakeholders may have very different evaluation questions from health service stakeholders for example.

### **Step 6: Who are the stakeholders?**

Linked to Step 5, there may be numerous other parties that need to be considered and involved in the evaluation, in terms of shaping, facilitating, participating in or 'owning' the conclusions of the evaluation. Views and experiences of all stakeholders are important. Consider internal and external stakeholders who have an interest in or will be impacted upon by the project aims and delivery. They should all be involved in evaluating and subsequently shaping the service. Your stakeholders may be service users, their families or carers, staff and/or volunteers working with, and for, the service and any partner organisations which may feed into, refer into or use your service. Potential service users and groups that represent unmet need may also be stakeholders.

### **Step 7: Any additional resources required for evaluation?**

Consider any additional resources that may be required for the evaluation in terms of funding, personnel, time, skills/training requirements and external expertise. You may need to consider commissioning an external agency to carry out all or part of the evaluation if you do not have the skills or resources in house. However, there are cost implications of this and there may be skills that exist that can be utilised.

### **Step 8: What data need to be collected & Methods of data collection?**

Evaluation involves the collection and analysis of reliable and relevant data. The data required in order to evaluate your project should become apparent from the previous steps above. Think about the data that could be available to you already. There may be existing baseline data available. This could include baseline intelligence data that existed before the project/service started, to be compared with data collected after the project/service has been implemented, to show if it has made an impact. Similarly, a previous evaluation may have taken place which could be drawn upon to make comparisons.

You should also consider what new data need to be collected to support your evaluation. Consider what you want to know, what you want to measure and what data you need in order to do this. You may need to analyse service data, user records, admissions data, population data and/or gather data of service user opinions and experiences of the service by way of qualitative focus groups for

example, or a satisfaction survey. Finding out what service users and staff think of your service will help you to judge and assess the quality of the service you are providing and whether any improvements need to be made.

What methods of data collection will your evaluation use? You will need to think about the new data you need to collect and the different methods you can use to do this. You can collect data through interviews or focus groups or surveys, for example. There are many innovative techniques (e.g. diaries or vox pops) within this that can be utilised for your particular user group. See [Fact sheet 15: What are the best research and evaluation methods to use?](#)

### **Step 9: Any limitations or barriers in collecting or evaluating data?**

It is worth identifying any issues or risks that may delay or compromise your service evaluation. These might include ethical and legal issues, issues related to gaining participants' consent, working with vulnerable adults, working with children, political issues, access issues or capacity issues. Consider data protection issues when using service user details and where necessary other ethical considerations. See [Factsheet 13: Ethical considerations in research and evaluation.](#)

You need to think about who will collect the data that you need and whether they have the time and skills to do this. Staff may need to be trained in data collection techniques and you may want to think about using service users or ex users to gather data via peer techniques.



### **More on this topic and further reading**

For more information on why evaluation is beneficial for your project or service, see [Factsheet 5: Why do I need to evaluate my project?](#)

Examples of evaluation projects run by NHS Wirral can be found on the JSNA website: [Joint Strategic Needs Assessment - Evaluation](#)

Other useful documents & websites:

<http://www.amnesty.org/en/library/info/POL32/003/1999>

<http://www.jrf.org.uk/publications/evaluating-community-projects-practical-guide>

<http://www.ces-vol.org.uk/Publications-Research/publications-free-downloads/first-steps-monitoring-evaluation>

<http://www.ces-vol.org.uk/Resources/CharitiesEvaluationServices/Documents/Guidance%20paper%201.pdf>

<http://knowledgestreet.co.uk/index.php/researchguides/16-monitoring-and-evaluation/76-connexions-a-little-book-of-evaluation>

<http://www.ces-vol.org.uk/Resources/CharitiesEvaluationServices/Documents/guidancepaper3-421-429.pdf>

<http://www.civicus.org/new/media/Monitoring%20and%20Evaluation.pdf>

<http://www.ces-vol.org.uk/index.cfm?pg=544>

<http://www.ces-vol.org.uk/index.cfm?pg=112>