Climate Action Fund: Learning Signposts #1

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Generating evidence about socio-economic outcomes from climate action

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Summary of key points:

- Many CAF projects are working towards a **'Just Transition'**[1], so your project is likely to have important social and economic aims as well as urgent environmental and carbon goals.
- **Don't be put off by the language.** Use existing learning approaches and community engagement as your starting point.
- **You don't need to measure everything.** Think about **why** you're collecting evidence before you start. This will save time and effort and help you comply with GDPR. The National Lottery Community Fund's approach to evidence gathering and evidence gathering principles may provide a useful steer.
- Use MB Associates' '**CORE' principles** to cut through confusion about which tools/methods to use. Think about whether your approach is: **C**onvincing for the audience for your monitoring/learning work; **O**n message, fitting what you want to achieve; **R**ealistic within the time and resources available; and **E**nough for what you need.
- **Don't just do surveys!** Collect richer evidence in the form of stories and images as well – using photos, video clips and quotes, free form writing, blogs and so on, then think how they demonstrate (or challenge) your story of change.
- **Use embedded/creative feedback activities** like post-it exercises, creative or physical activities to make it fun and avoid lack of feedback from participants who are less engaged
- If you're doing a survey, save time later by including a question asking **permission to contact** the person later for a more in-depth interview
- **If you're still planning your project,** make sure you budget enough time for learning and evaluation activities, both for the people leading them and the people participating in them.

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[1] https://www.ituc-csi.org/IMG/pdf/ituc_frontlines_climate_change_report_en.pdf

Who this is for:

This learning signpost is for people involved in Climate Action Fund projects who are trying to work out how to assess or measure the wider socio-economic benefits or 'co-benefits' of climate action, or are thinking about wider 'Social Value' approaches.

This note is meant to act as a starting point. We will update and revise it as the Climate Action Fund programme evolves. So please let us know if you have any suggestions to improve it, or can suggest any useful resources to add to it, by contacting Mary Anderson on Slack.

Going forward, the Support and Learning team hopes to develop masterclasses and peer mentoring processes via the Climate Action Fund Learning Hub that will share insights on approaches, methods and tools. These learning opportunities will be publicised via Slack.

Definitions

You may come across many different words being used to describe socio-economic outcomes. There's no single definition of these terms but, for clarity, let's define how we're using the terms in this note.

Your project aims to make change happen and make a real difference to local people's lives. In the light of the 'Just Transition', your aims are likely to include important social and economic as well as urgent environmental and carbon goals. We use the term **'outcome'** is something that you aim to change as a result of your project. What your desired outcomes are depends on your project aims. Outcomes are different from the '**outputs'** that measure more directly what your project is delivering (e.g. the number of events held; the number of people reached; number of energy efficiency measures installed; tonnage of materials recycled or of affordable food provided etc). Instead, outcomes reflect the underlying reasons *why* you are doing the project – these may include not only carbon savings but also improvements in local people's mental health and wellbeing, reduction in their utility bills, and development of 'green skills' (e.g. food growing, energy efficiency retrofit skills), as well as possibly improvements to biodiversity and the local natural environment. Sometimes outcomes stack up in a sequence, so you might be thinking about changing people's attitudes before you change their environmental behaviours (or vice versa!).

> **Cold to Cosy:** An example from Cumbria Action for Sustainability is the recent award-winning Cold to Cosy initiative, which insulates people's homes saving money (economic benefit), making them warmer (social and/or health benefit) AND saving carbon (environmental benefit).

Within the timescale of the projects themselves, evidence will generally become available on 'outputs' and the direct or short-term 'outcomes' of the project. These may lead to indirect or longer-term outcomes (sometimes called **'impacts')** that will take longer to evidence.

These wider socio-economic outcomes are sometimes referred to as the **'co-benefits'** of climate action. 'Co-benefits' are 'benefits that accrue as a side effect of a targeted policy'[2]. They are positive benefits of climate action, alongside its environmental effects.

Socio-economic benefits can generate more direct and immediate benefits to local people in your community, alongside longer term, more indirect benefits from saving carbon. For example, a community-led initiative that is growing local, sustainable food may not only reduce carbon emissions but may also provide local people with more affordable healthier food, contribute to the mental wellbeing of volunteers, build the skills of volunteers and staff, improve local people's resilience to supply chain shortages, improve local biodiversity and help to build links within the community. This note provides signposting to resources on how to gather evidence of these wider socio-economic benefits.

The **Ashden Co-benefits Toolkit.** This presents a host of examples of climate action generating wider benefits for local communities. It was written as a toolkit for local authorities but may have useful ideas for you too. It provides guidance on community engagement and presents evidence about the links between climate action and:

- Warmer homes, cleaner air, more active lifestyles, healthier diets leading to improved health
- Jobs, skills, income and business opportunities leading to economic benefits
- Climate adaptation, energy security and adaptability leading to increased resilience
- Reduced fuel poverty and other actions focused on deprived communities, leading to increased equity

You may also come across the term **'Social Value'[3].** This is generally used to cover not just social and economic impacts but also carbon. 'Social Value' plays a role in the procurement of services by local authorities and other public bodies. The 'Social Value Act, 2012' allows these organisations to take account of wider social value when selecting suppliers. We say a bit more about the pro's and con's of social value tools in the Annex. This note just looks at social and economic outcomes because carbon outcomes are covered in a separate note: Learning Signpost #2.

Methodologies, methods and tools – most of the resources flagged in this note are specific 'tools' or 'methods'. These will need to fit within your overall framework for assessing impact and evaluating your project (e.g. Story of Change[4], Theory of Change, Social Return on Investment). Examples of wider evaluation methodologies/frameworks and specific methods/tools are given in the Annex.

Why generate evidence about socio-economic outcomes?

Generating evidence about your project's contribution to your target socio-economic outcomes will help you to show the impact and difference of your work to others. This might encourage others to get involved, increase your success in approaching potential funders, or help you tell The National

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[2] Pearce, D. Policy Frameworks for the Ancillary Benefits of Climate Change Policies. CSERGE Working Paper GEC 2000-1. p1.
[3]

[4] See presentation on 'Telling a Story of Change' from break-out session at Nov 2021 CAF cohort workshop. Available in Slack resources folder here: https://onedrive.live.com/edit.aspx?cid=07aae2e518b8dc87&page=view&resid=7AAE2E518B8DC87!156&parId=7AAE2E518B8DC87!151&authkey=!AAvVZgLzE_a3xZI&app=PowerPoint

Lottery Community Fund what's been happening. It will also help you to learn about what works and what does not, which you can apply in your own work and also share with the wider movement of community-led climate action. Finally, as people increasingly 'co-create' projects with participants, it can be motivating and empowering for the people involved to begin to see the difference they are making.

You need to be realistic about how much effort you can put into this. **You don't need to measure everything!** Try to develop an approach that is consistent with MB Associates' CORE principles (see box). You may also find it useful to look at the Fund's own guidance on ['good evidence'](#).


CORE principles for outcome assessment and learning/evaluation:
Check that your approach is:
- **C**onvincing (to potential funders and other audiences you want to influence)?
- **O**n message (i.e. consistent with your aims)?
- **R**ealistic (with the time and resources you have)
- **E**nough to make the case (but not more than good enough)

How to generate evidence about socio-economic outcomes?

It's important to recognise that assessing and learning about outcomes is an ongoing, cyclical process. We present a very simple 'plan-do-review' cycle below, but there are other planning and review approaches that can help you do this. For example, there is a step-by-step guide developed by the National Lottery Fund that breaks these steps down into more detail.[5]

REVIEW   PLAN

DO

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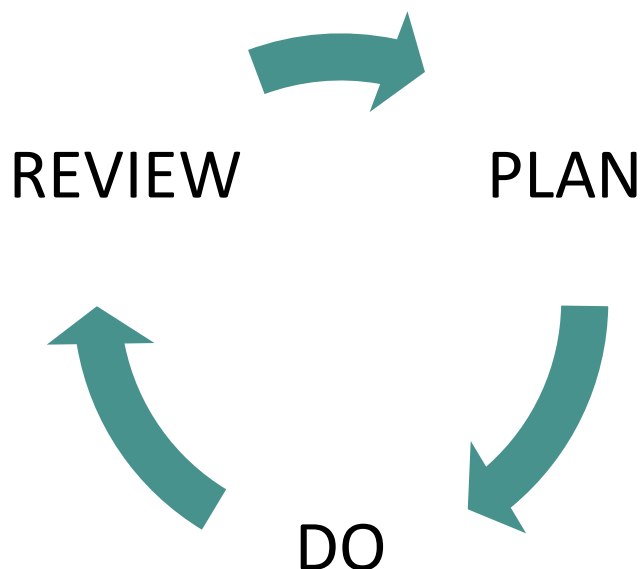
[5] The learning cycle developed by the National Lottery Community Fund follows similar principles but has five stages. You can find out more about the steps [here](#). Guidance on learning cycle steps is also available from [Culture Cubed](#), developed by MB Associates in partnership with Kent County Council.

PLAN - decide on your approach and plan your evidence generation

It's up to your project to identify the socio-economic outcomes that you are aiming to evidence. You may already have done this in your grant application, project plans or evaluation framework. If not, you may want to work collaboratively with your project team and beneficiaries to identify the outcomes that really matter to them, beyond carbon savings. The Annex has information on some existing outcomes frameworks which provide a wide menu from which you can choose the socio-economic outcomes that matter to your project. These outcomes might include, for example:

- Improved health and wellbeing for local people
- Improved access to skills, training and jobs
- Reduced poverty, inequality and inequity
- Capacity building, empowerment and improved social cohesion within the community
- Improved biodiversity in the local environment
- Improved resilience of the local community to future change (including energy costs, food costs and future climate impacts)

The steps that you may consider when planning evidence gathering for socio-economic outcomes include:

- Identify the **broad outcome themes** that matter for your project (e.g. health, wellbeing, employment, skills, biodiversity).
- **Define the specific outcomes** that you want to assess (e.g. what aspect of health? What aspect of wellbeing?).
- **Define the questions** you're going to ask and/or metrics you're going to use.
- **Decide how you will collect the evidence** (e.g. online surveys, face to face surveys, embedded and interactive feedback from events, observations, feedback from beneficiaries – written, visual, video etc). Make sure your methods will capture stories, images and insights, as well as numbers.
- **Think about how to collect evidence in participatory, fun and engaging ways** (Asking people for feedback on post-it notes (real or virtual) or flipcharts is one approach, but there are lots of others. You can ask people to give feedback in creative ways (e.g draw an image, sketch a map, take a photo, make a video or podcast); give feedback physically (e.g. choosing where they stand in the room – along a line, in order, or in different groups; how high they jump..); or ask them to 'vote' their answers using counters). There are lots of resources with inspiring ideas about participatory and co-production methods – see the Community Research toolkit and resource list published by ARVAC[6], the methods pages published by involve and information about Participatory Appraisal[7] methods.)
- **Think about the ethics of your research,** how willing people will be to share information about themselves, whether their responses need to be treated as confidential, what their information will be used for and what permissions/consents you need to ask for, to ensure

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[6] Association for Research in the Voluntary and Community Sector
[7] Participatory Appraisal methods were originally developed within international development work but have become widely used by many communities around the globe. See also: https://www.involve.org.uk/resources/methods/participatory-appraisal.

that your approach is ethical and complies with GDPR. Scotland's Third Sector Research forum has published practical guidance on ethical research principles: need, integrity, accountability, confidentiality and safety. Find out more [here.](#)

- Decide your method for **collecting and storing** the evidence (e.g. you might use a survey platform that will collect and store your data – such as the Happiness Pulse; a Client Relationship Management (CRM) tool can be used to store both quantitative and qualitative evidence – including links to stories, case studies, blogs and videos).

If your project is at the 'development stage', you also need to think about how much time and budget you are going to allow for learning and evaluation activities. As well as allowing time for people to lead this activity, you need to think about the time that other team members will spend contributing to it, whether that's taking part in workshops, participating in research, incorporating feedback mechanisms into their work or encouraging project participants to tell their stories in blogs or videos.

DO – generate your evidence

- **Collect and store evidence -** this can include participatory methods, online surveys, face to face surveys, embedded and interactive feedback from events, and feedback from beneficiaries. Evidence can be qualitative and quantitative, both written and visual (e.g. records of feedback from participatory exercises, sketches, videos, clips, images, etc). It can be stored in spreadsheets, on an online platform or in a CRM.
- **Analyse and present evidence** – Evidence is likely to include some statistics, ratings and charts (e.g. outcome stars, webs). But it's also helpful to bring your outcomes to life using real-life quotes, case studies, stories, images and videos. You may present information in a report or online, possibly using some form of 'dashboard' to summarise high-level outcomes.
- **Check and validate –** use 'triangulation' to check findings from different perspectives or people, and check back with those involved to 'validate' your findings with them.
- **Attribution matters** – is the change that you're seeing attributable to your project or other factors? There is no magic way of assessing this – but having a clear and well evidenced 'story of change' for your project or activity can help, by helping to define the role that the project is actually playing.

> **Hints and tips:**
> - You don't need to start from scratch – see the annex for existing frameworks and tools
> - Make it participatory and fun – include creative, interactive methods, not just surveys
> - Find ways of collecting and sharing stories, not just statistics
> - Keep it 'CORE' – for example, don't make surveys too onerous for users (you may get fewer responses or – worse still – put them off participating)
> - Choose approaches that will allow you to detect change from your project (area-wide indicators may be too broad for this)
> - Choose approaches that can be repeated, so that you can capture baseline evidence and then update at intervals
> - Think about the methods that will work best with your target groups
> - Make sure your research approach is ethical, kind to participants and complies with GDPR
> - Share findings on what didn't work, as well as what did – things don't always go to plan and we can all learn from mistakes or from trying new things!

REVIEW – using your evidence and feeding it back into your future learning

- **Review –** reflect on the findings with your partners and stakeholders; pull out lessons for future implementation of your project and other similar initiatives (e.g. what worked well; what worked less well). It may be really difficult to make time in people's diaries for reflective learning sessions, but – when they do happen – participants are likely to find them very useful.
- **Share your findings** – share findings with people in your project so that they can learn from what has happened so far and adjust project delivery as needed; share evidence and learning with other CAF projects and with The National Lottery Community Fund; share evidence with other funders and partner organisations.
- **Feed your learning and insights into the next learning cycle,** adjusting focus and/or metrics if needed, while trying to keep consistency so that you build up evidence of change over time.

Existing frameworks, tools and methods

The Annex outlines a number of existing frameworks, tools and methods covering: broad socio-economic outcomes; wellbeing; social cohesion; equity, economic outcomes (e.g. green jobs) and engagement. The final sections of the table highlight some tools that can be used to collect evidence, including 'softer' evidence such as visual and interactive feedback and participatory approaches involving co-creation or co-production of evidence.

This list is a starting point and will be refined and added to (or streamlined!) as the CAF programme progresses – it's not an exhaustive list or endorsement of particular tools or approaches. Some of these tools are more up-to-date than others. It can also be overwhelming to consider the options available, so please do ask and share feedback on Slack about any tools or approaches that you have found useful (or not!).

Examples

The examples below show how other organisations, including the National Lottery Community Fund itself, present visual and engaging information about a broad range of socio-economic outcomes:

- Y Dref Werdd. This TNLCF-supported project explicitly works with poverty as well as carbon reduction (particularly fuel poverty, but also food waste etc.). The report uses numbers well, providing evidence of money/carbon saved and translating savings into understandable and imaginative measures to help make a potentially abstract subject feel much more concrete.
- The TNLCF's own Impact Report highlights many social and economic outcomes of the Fund's work, presenting this evidence in an engaging way.
- Middlesbrough Environment City uses quotes and images to bring their impact assessment to life, linking environmental awareness and socio-economic development.
- The 'Recycling Lives' Impact Report is an example of powerful presentation of case studies and outcome findings for this organisation's broad work with food 'waste' redistribution, providing rehabilitation/wrap around support for offenders/ex-offenders, supporting homeless people via its residential facility and offering other types of support to help people get their lives back on track.

Annex: List of relevant frameworks, tools and methods for generating evidence of socio-economic outcomes

This annex provides some starting points for projects new to gathering evidence of socio-economic outcomes. As well as recommending good, existing tools for new starters, it also provides a wider reference list of other tools and approaches that other projects may come across, so that you can see how they fit together.

Contents:

1. **Broad frameworks, approaches and tools covering social, economic and environmental outcomes**
2. **Tools for assessing wellbeing outcomes**
3. **Tools for assessing community cohesion outcomes**
4. **Tools for assessing equity outcomes**
5. **Tools for assessing economic outcomes**
6. **Methods and tools for engaging stakeholders and collecting evidence**

1. BROAD frameworks, approaches and tools covering social, economic and environmental outcomes

Introduction

There are a large number of learning and evaluation guides and outcome frameworks available online. Some of them are tailored to the needs of community groups. The list below flags some that we are aware of, but there are many others not on this list! If you need guidance on where to start, find one that appeals to you and stick with that – don't feel you need to check them all out. Some of the older resources are still very useful.

Overall guidance on approaches to learning and evaluation

- The National Lottery Community Fund publishes guidance on the process of gathering evidence and learning here.

- Overall guidance on a learning and evaluation process is also available from Culture Cubed, developed by MB Associates in partnership with Kent County Council.

- Developing a 'story' or 'theory of change' is likely to be central to your approach. There are many sources of guidance on this, but you can find a starting point in the presentation on 'Telling a Story of Change' from break-out session at Nov 2021 CAF cohort workshop. Available in Slack resources folder here.

- The Community Research toolkit and published by ARVAC[8] also covers the whole process, while the resource list attached to the toolkit has pointers on just about every evidence gathering method you could think of.

- Similarly the methods pages published by involve allow you to look up all sorts of evidence gathering approaches and find out broadly how they work.

- Transition Network: A step by step guide to Monitoring and Evaluation (2014) – covers the whole process of monitoring action on climate change and energy

Suggested starting point for an outcomes framework covering a wide range of social and economic outcomes

There is no obligation for CAF projects to use the framework below, but it provides a good starting point if you are new to assessing socio-economic evidence. It sets out a 'menu' of socio-economic measures covering a wide range of issues. You don't have to use the whole framework but can select the themes and measures that are most relevant to your project aims and your participants/audience. The framework not only suggests outcome indicators under each theme

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[8] Association for Research in the Voluntary and Community Sector

but also sets out the question or metric that you would need to collect the relevant evidence. **If you do nothing else with this note, it's worth checking out the 'Understanding Thriving Communities' measures bank - many of the outcome indicators recommended for specific themes below are included in this overarching framework.**

Type of framework/tool	Which part of the process can this help with?	About this framework or tool
Understanding Thriving Communities- report and measures bank	Defining specific outcomes and questions/metrics	Developed by 'What Works for Wellbeing', in partnership with the Centre for Thriving Places (previously called 'Happy City') and The National Lottery Community Fund. The measures bank suggests a range of specific outcome indicators and questions /metrics for different 'thriving community' themes, linked to wider datasets where possible. The themes are: - People-led - Relationships and connections - Individual wellbeing and resilience - Places and spaces - Other factors For any given theme, many of the outcome indicators are taken from tools referenced in the rest of this document. The background report presents research findings on what makes communities thrive and explains the background to the measures bank.

Other resources – for reference – not necessarily recommended or endorsed

Resource	About this resource	Pro's and con's
Thriving Places indicators	This is a suite of UK indicators covering a wide range of quality of life outcomes. Data is available at local authority level, providing a high-level overview of the status of your area against these outcomes.	**Pro:** existing outcome framework and data sets at local authority level; good for comparing your findings to local context. Endorsed by Kate Raworth, author of 'Doughnut Economics'. **Con:** impact of a successful CAF project is unlikely to be detectable on these area-wide outcomes, within project timescales. But the indicators can provide contextual data.

Resource	About this resource	Pro's and con's
Themes, Outcomes and Measures (TOMs)	TOMs (Themes, Outcomes, Measurements) – developed by the Social Value Portal consultancy, the TOMS framework can be used to calculate a measure of social value by plugging in appropriate metrics, covering social, economic and environmental outcomes.	**Pro:** a lot of Local Authorities, and the Welsh Government, are using TOMs to quantify Social Value in procurement processes. Convenient and easily comparable to others. **Con:** Whilst they do allow some comparison, TOMS measures are not good for understanding specific local contexts, or exploring the different value that diverse communities place on things. The specific metrics used by TOMS tend to be relevant to larger commercial firms tendering for public sector contracts and may not be relevant to community-led climate action (e.g. TOMS asks about the number of apprenticeships offered).
SROI	Social Return on Investment is a participatory method that identifies outcomes, quantifies these outcomes and then monetizes them, using financial proxies for outcomes that are not usually monetized.	**Pro:** provides quantification of a wider range of benefits than standard cost benefit analysis. **Con:** can be resource and time intensive, because it requires considerable stakeholder involvement.
Outcomes Matrix	Developed by social investment organisation Big Society Capital. Covers: - Arts, heritage, sports and faith - Citizenship and community - Conservation of the environment - Employment, training and education - Housing and local facilities - Income and financial inclusion - Mental health and wellbeing - Physical health	**Pro:** downloadable tool, free to use. Tutorial video talks you through the tool, to help you create an outcomes matrix. **Con**: the matrix gives you suggested indicators, but you then need to collect the evidence!
Social Value Library	Global network for social value and impact management	**Pro:** wide range of resources available
Impactasaurus	Free online tool for small and medium sized charities	**Pro:** free tool; catalogue of questionnaires.
Inspiring impact	Created by a coalition of six charity sector groups, including New Philanthropy Capital and NCVO.	**Pro:** wide range of resources available. Includes tools to diagnose your current impact measurement. **Con:** site closes early in 2022 – check it out now!

Resource	About this resource	Pro's and con's
Outcomes Stars	Developed by Triangle consultancy, Outcomes Stars are tools to help measure outcomes for service users and inform service improvements. There are many different variations of the Star, tailored to specific social service sectors and co-created with services and service users. The Community Star measures progress and outcomes across six key areas, each of which is underpinned by a five-stage Journey of Change: 1. Feeling safe 2. Getting to know people 3. Making a difference 4. Building a healthy lifestyle 5. Making greener choices 6. Confidence and learning See here for a blog by Triangle on using Outcome Stars as a tool for measuring wellbeing.	**Pro:** visual representation of findings in the 'Star', with ratings for each agreed outcome **Con**: licenced tool available from Triangle; time and resource intensive process.
UN SDGs	The UN Sustainable Development Goals (SDGs) provide a broad framework covering a wide range of social, economic and environmental outcomes.	**Pro:** widely recognised and used, but very general. Con: some criticisms of SDGs from global South.
Local 2030	Local 2030 is platform and network of organisations around the globe that aims to support on-the-ground assessment and delivery of the SDGs.	**Pro:** potential to learn from other projects **Con:** how useful this is depends on whether other projects/organisations have learning to share that is relevant to your project

2. Tools for assessing INDIVIDUAL WELLBEING outcomes

Introduction

Many CAF projects aim to improve people's quality of life and wellbeing. This section suggests some starting points for gathering evidence about wellbeing outcomes for individuals. The next section covers community cohesion.

Suggested starting points for assessing wellbeing outcomes

The two tools below use some of the same questions, but the first provides four wellbeing questions/metrics while the second provides a survey-based data collection tool as well. As with the other tools, there is no obligation for CAF projects to use these tools but they may provide a useful starting point. Some of the indicators from these tools are incorporated into the 'Thriving Communities' measures bank, outlined under (1) above.

Type of framework/tool	Which part of the process can this help with?	About this framework or tool
ONS4 wellbeing questions	Defining outcome indicators; defining survey questions	Developed by the Office for National Statistics (ONS), the ONS4 are four survey questions about personal wellbeing that users rate on a scale of 0 to 10. **Pro:** widely used and well-validated, including use by some CAF projects. Contextual data available from Census. Questions can be used in local surveys. Free to use. **Con:** ONS4 does not provide a survey platform, just the questions themselves.
Happiness Pulse	Defining outcome indicators; defining the questions to be asked; collecting, analysing and storing survey data	This tool has been developed by the Centre for Thriving Places (previously called 'Happy City') in partnership with the New Economics Foundation, ONS, The National Lottery Community Fund and other partners. It's designed for use by projects that are seeking to monitor users' wellbeing at various stages in a project. The survey has four basic modules: General wellbeing, Be, Do and Connect, incorporating metrics from the short scale of Warwick and Edinburgh Mental Wellbeing (WEMWBS see below). Advanced modules can be added (including the 'Community Pulse' module focusing on how the place people live impacts on their wellbeing). **Pro:** ready-made tool. Already taken by more than 30,000 users, with results comparable to a national survey by YouGov in 2018. Basic version of tool is free to use. Online survey takes users approximately 5 minutes. **Con:** provides quantitative survey data not in-depth insights; focused on wellbeing – may not cover all the outcomes you want to assess; multiple users, detailed analysis and advanced/custom survey modules would require a paid plan.

Other resources – for reference – not necessarily recommended or endorsed

Resource	About this resource	Pro's and con's
Warwick and Edinburgh Mental Wellbeing Scale (WEMWBS)	Developed by NHS Health Scotland and Warwick University, WEMWBS is a widely used and well-validated scale for assessing mental wellbeing. There are two scales, one with 14 items and a shorter scale with 7 items. Users rate their responses to statements such as 'I've been feeling optimistic about the future' and 'I've been feeling useful' and 'I've been feeling relaxed'.	**Pro:** widely used, well-validated and recognised by the medical and scientific community. The shorter WEMWBS scale is referenced in other tools (e.g. Happiness Pulse, see above). **Con:** some community groups have found WEMWBS complex to implement. It provides quantitative survey data not in-depth insights; it's focused on wellbeing – and may not cover all the outcomes you want to assess; WEMWBS is protected by copyright. Non-commercial organisations can register to use the scale, subject to certain conditions.
Good practice guide for monitoring wellbeing - Our Bright Futures	This guidance was developed by Our Bright Futures, a programme led by Tee Wildlife Trusts which aims to empower young people to become skilled and engaged citizens (with support from the National Lottery Community Fund).	**Pro/Con:** Focused on how to use the WEMWBS short or long scale
Measure What Works Wellbeing	Practical guide for charities and social enterprises looking at impact measurement; includes a 'Wellbeing Measures Bank'.	**Pro:** provides an overview of many of the tools outlined above, as well as other tools. A resource to dip into, no matter what stage you are at. **Con:** none – other than potential confusion about all the tools available!

3. Tools for assessing COMMUNITY COHESION outcomes

Introduction

Relationships and linkages within the community contribute to 'community cohesion', which is part of what makes a thriving community. Equity, diversity and inclusion issues are covered in the next section.

Suggested starting point for assessing community cohesion outcomes

Type of framework/tool	Which part of the process can this help with?	About this framework or tool
Understanding Thriving Communities- report and measures bank	Defining specific outcomes and questions/metrics	This tool, already referenced under (1) above, includes outcome indicators for the theme 'relationships and connections', which covers many aspects of social cohesion. This tool was developed by 'What Works for Wellbeing', in partnership with the Centre for Thriving Places (previously called 'Happy City') and The National Lottery Community Fund. The measures bank suggests a range of specific outcome indicators and questions /metrics for 'relationships and connections', linked to wider datasets such as the Community Life Survey (see below). The background report presents research findings on what makes communities thrive and explains the background to the measures bank.

Other resources – for reference - not necessarily recommended or endorsed

Resource	About this resource	Pro's and con's
Community Life Survey	An annual Government survey led by the Department of Media, Culture and Sport covering a number of measures including social cohesion, community engagement and social action.	**Pro:** widely used and well-validated. Contextual data available from national survey. Questions can be used in local surveys. Free to use. **Con:** Community Life Survey does not provide a survey platform, just the questions themselves.
Community Mapping and Tension Monitoring	Developed by Sheffield Hallam University for Welsh Local Authorities in 2011, who have considerable experience of researching social cohesion issues.	**Pro:** 'how to' guidance on community mapping **Con:** approach focuses on identifying community tensions so may be more relevant to some projects than others
Scottish Community Development Centre resources	General resources on community development, co-production, community capacity building etc	Interesting resources - may or may not be relevant to your needs

Resource	About this resource	Pro's and con's
Framework and tools for community development	A framework and tools for community involvement, participation, capacity building and development, including a monitoring and evaluation framework called 'Achieving Better Community Development' (ABCD[9]). Document produced by COGS for the South Yorkshire Coalfield Partnership in 2003.	A bit dated, but still useful. Some of the links in the document may not longer work (e.g. links to CDF website). The Community Development Foundation, which used to offer training on 'ABCD', no longer exists.

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4. Tools for assessing EQUITY outcomes

Introduction

Equity, diversity and inclusion are important issues in many CAF project's approach to climate action and a 'Just Transition' to Net Zero. This section suggests some starting points for gathering evidence about wellbeing outcomes for individuals. The previous section covers community cohesion.

Suggested starting point for assessing equity outcomes

Equity is not a major theme in the Thriving Communities measures bank, so you might want to look at the Equity Compass.

Type of framework/tool	Which part of the process can this help with?	About this framework or tool
Equity Compass	Defining outcome indicators	The Equity Compass is a tool for supporting socially just practice, developed by the Youth-Equity-STEM (YESTEM) project. While developed for the education sector, it has much wider application. It covers four areas: - Challenging the status quo - Working with and valuing minorised communities - Embedding equity - Extending equity In each area, the compass defines 2-3 dimensions, and sets out some guiding questions that projects and organisations can ask themselves.

Example

- Black and Green Ambassadors – a project in Bristol, run by Ujima Radio and Bristol Green Capital Partnership, which aims to connect, empower and celebrate dives leadership and community action on environmental issues in Bristol and beyond.

5. Tools for assessing ECONOMIC outcomes

Introduction

Support for 'green jobs' or 'green skills' (e.g. in retrofit, repair or other sectors) is likely to form an important element of many CAF projects. Jobs, skills and training are vital for people's wellbeing, and they also carry weight when you're communicating with your local authority or Local Enterprise Partnership (LEP). Economic outcomes can play a powerful role when you are communicating the 'co-benefits' of community-led climate action.

Suggested starting points for assessing economic outcomes

Type of framework/tool	Which part of the process can this help with?	About this framework or tool
Understanding Thriving Communities- report and measures bank	Defining specific outcomes and questions/metrics	This tool, already referenced under (1) above, includes economic outcome indicators under the sub-theme 'having the financial and emotional resilience to overcome challenges' within 'Individual Wellbeing and resilience. The tool was developed by 'What Works for Wellbeing', in partnership with the Centre for Thriving Places (previously called 'Happy City') and The National Lottery Community Fund. The measure bank suggests a range of specific outcome indicators and questions /metrics for 'financial resilience', linked to ONS and other national data sources.
Mandatory reporting indicators for Building Better Opportunities programme	Defining outcome indicators	Building Better Opportunities is a major programme supporting pathways to training and employment, supported by the EU and by the National Lottery Community Fund. Each project in the programme defines its own project outcomes but also has to report on mandatory 'hard' outcome indicators. These basic 'hard' outcomes are: - someone moving into employment or self-employment - someone moving into education or training - someone being or becoming 'economically inactive' (not the same as unemployed). More nuanced insights on economic outcomes can be found in the national evaluation report for the BBO programme and in individual project reports. A fuller set of economic outcome indicators can be found under the European Regional Development Fund (ERDF) and European Social Fund (ESF) guidance cited below.

Other resources – for reference – not necessarily recommended or endorsed

Resource	About this resource	Pro's and con's
ERDF and ESF indicators	Provides guidance on results indicators for regeneration and training projects funded by the European Social Fund e.g. 'disadvantaged participants in employment, or self-employment, six months after leaving' (longer term)	**Pro:** well-recognised metrics **Con**: quantitative focus – need stories as well
Skills Builder Framework	Framework of general skills (e.g. listening, problem solving, creativity, staying positive, aiming high, leadership, teamwork). Provides free toolkits and resources for embedding essential skills into your services – including Youth and Inclusion guides)	**Pro:** well-developed framework developed by a social enterprise, the Skills Builder Partnership **Con**: may be too general for the needs of CAF projects
Low Carbon and Renewable Energy Economy	Government statistics relating to the 'energy' part of the green economy, including: energy efficient products; low-emission vehicles and infrastructure; bioenergy; nuclear power; offshore wind; onshore wind; energy efficient lighting; solar power; energy monitoring systems; renewable combined heat and power	**Pro:** national statistics available **Con**: sector coverage may not fit your project aims
International Labour Organisation – green jobs	Defines green jobs as 'decent jobs that contribute to preserve or restore the environment'. By ILO definition, green jobs help to: - Improve energy and raw materials efficiency - Limit greenhouse gas emissions - Minimise waste and pollution - Protect and restore ecosystems - Support adaptation to the effects of climate change	**Pro:** guidance and assessment reports available, using ILO green jobs definition **Con**: fairly high-level and possibly a bit dated
Europa indicators	Contextual statistics and associate resources about the economic (or socio-economic) benefits (e.g. employment, revenues, trade) arising from 'eco-innovation' activities.	**Pro:** may be useful to quote some of these statistics, or use them to underpin economic evidence . **Con:** national rather than regional or local statistics.

6. Methods and tools for ENGAGING stakeholders and COLLECTING evidence

Introduction

All CAF projects will need to engage stakeholders and collect evidence. There are many participatory approaches that can help to you engage people and bring stories alive. If you're just starting out, here are some resources that may be useful.

Suggested priority sources

Type of framework/tool	Which part of the process can this help with?	About this framework or tool
Community Research toolkit	Evidence gathering, including participatory approaches	This guidance, published by ARVAC[10], sets out the whole evidence gathering process, while the resource list attached to the toolkit has pointers on just about every evidence gathering method you could think of. . If someone refers to a method, you will probably be able to find out more about it in the resource list. The resource list includes a wide range of 'how to' guides (e.g. how to make a podcast; how to design and use free on-line surveys).
Methods resources published by 'involve'	Evidence gathering, including participatory approaches	If you are considering using an evidence gathering/engagement or co-production approach, you can look it up on this 'methods' list and find out broadly what's involved.
Community-led Action Research	Evidence gathering, including participatory approaches.	Guide to community-led action research, developed by the Scottish Community Development Centre. Includes tools and resources for a wide range of participatory methods (e.g. story dialogue, drawings, photographs, observations and recording, visible recording, walking along with people, voxbox/video box and case studies).

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[10] Association for Research in the Voluntary and Community Sector

Other resources – for reference – not necessarily recommended or endorsed

Resource	What's it for	About this resource	Pro's and con's
Videos and blogs	Collecting stories and case studies	Can range from informal blogs and photos (or 'vlogs' made using a phone) to professionally produced videos using ethnographic and participatory filming techniques. There are specialist firms offering these services (e.g. PhotoVoice; Close-Up Research), some of whom also offer training.	**Pro:** highly effective in bringing stories alive and gathering/communication 'softer' project evidence that's often difficult to record **Con:** professional videos can be costly
Online survey platforms	Collecting survey evidence; storing and analysing survey evidence	A wide range of online survey platforms are available (e.g. Survey Monkey; Smart Survey and others).	**Pro:** convenience – issue surveys; collect results online and create charts. **Con:** subscription based; check for GDPR compliance
Customer Relationship Management Systems	Collecting survey evidence; storing and analysing survey evidence	A wide range of CRM systems are available (e.g. Makerble). You could treat either individuals or 'sub-projects/groups' as participants in the CRM.	**Pro:** convenience - collect and store both qualitative and quantitative evidence in one place **Con:** subscription based; set up cost.
Building Better Futures toolkit	Planning and undertaking engagement processes; collecting evidence via engagement	Creative tools and techniques for planning/delivering engagement processes	**Pro:** takes you through the whole process; used by at least one CAF project. **Con:** provides engagement rather than assessment tools
Live poll platforms	Collecting audience evidence from events	Products such as 'Turning Technologies' and 'Sli.do' can be used to collect live feedback during online or face to face events, via people's computers or phones.	**Pro:** participatory; capture evidence **Con:** may not be accessible to all participants, because of the technology involved or their learning styles
Whiteboard platforms	Collecting audience evidence from events	Products such as Jamboard and Miro can be used instead of post-its to encourage participation during virtual workshops.	**Pro:** participatory, capture evidence **Con:** may not be accessible to all participants

Resource	What's it for	About this resource	Pro's and con's
LEAP manual	Broad framework and approach	Learning, Evaluation and Planning in Community Learning and Development, published in 1999 by the Scottish Government	Supports a partnership approach to achieving change and improvement in the quality of community life
Participatory appraisal	Participatory evidence gathering	Participatory Appraisal methods were originally developed within international development work but have become widely used by many communities around the globe.	**Pro:** flexible ideas that you can adapt **Con:** some approaches would need adaptation to UK context
Consent Kit	Collecting evidence; managing stakeholder engagement	Research governance platform that can help automate the admin side of research and ensure GDPR compliance	**Pro:** convenient; GDPR compliant; used by at least one CAF project. **Con:** subscription based

Examples

- **Our Bright Future** – a National Lottery Community Fund-supported project, led by The Wildlife Trusts, working to ensure that young people get what they deserve: a healthy planet, a thriving greener economy and a bright future. Good resources for gathering socio-economic impact evidence are published on their website, including good practice guides on involving young people, evaluating impacts and getting involved. Examples of project impact reports are published on line, including Groundwork's Green Leaders project, Feedback's Farm to Fork project.

- **Centre for Alternative Technology (CAT)** - you can find loads of resources, examples and advice developed by CAT's project ' Zero Carbon Britain', including guidance on impacts and engagement, as well as CAT's free information service.