Proving & Improving

A simple guide to help community groups evaluate their sustainability projects

EGIN

Asedau Segur
Camau Cynaliadwy Cymru

Dormant Assets
Sustainable Steps Wales

Ddarperir gan
CRONFA GYMUNEDOL
LOTERI GENEDLAETHOL

Delivered by
THE NATIONAL LOTTERY
COMMUNITY FUND

Egin is a programme that aims to unlock the collective power of communities in Wales to take their first steps towards tackling climate change and living more sustainably – especially those who are the most likely to be affected by climate change.

The word "Egin" means shoots or sprouts in Welsh, and the aim of the programme is to help new ideas to generate and take root, empowering communities to come together and talk about the changes they want to see. Egin's main focus is groups who might not normally feel included in conversations around climate and sustainability, yet may be the most impacted by climate change. It works like this:

Interested groups are connected with an Egin Facilitator, who acts as a first point of contact – bringing a community together, listening to what everyone wants and needs, and helping them to decide whether getting involved with Egin is a good idea for them.

If groups decide to go ahead, their facilitator helps them sign up to the Egin programme and Egin Online Community – enabling them to stay connected, discuss ideas, and develop an action plan.

Groups are connected with 'Peer Mentors' people with the right knowledge and experience to support them in taking the first steps with the actions plans they have developed.

Once groups have made their action plans, they may consider applying for an 'Egin Grant' of up to £15,000 grant to help with the costs of delivering it.

This guide is designed to help at every step along the way.

With the many challenges we're facing now and in the next few decades, it's more important than ever that communities can come together to talk, plan and create the changes they want to see – to create a future that is fair, sustainable, and that works for everyone.

Egin is led by the Development Trusts Association Wales (DTA Wales) and will run until 2029. It is funded by a Sustainable Steps Wales – Mentoring Grant; the grants are administered by The National Lottery Community Fund and the funding comes from the Dormant Assets Scheme – which donates money left untouched for more than 15 years in bank accounts and building societies. It is built on the experience of our previous programme, Renew Wales, which helped hundreds of communities take action on climate change from 2012 to 2022.

Proving and Improving

What's it all about?

Proving and Improving is a simple guide for community groups who want to evaluate their sustainability projects and activities.

Evaluation isn't just about proving that something has worked. It's about understanding how something is working, what kind of a difference it is making, and how it could be changed to work even better. So this guide is for everyone who is passionate about what they do, and wants to make sure they never stop improving.

There is no shortage of great stuff out there about how to do evaluation. The challenge can be knowing where to start! *Proving and Improving* brings together dozens of brilliant evaluation resources from around the world, and through a series of simple reflections and multiple choice options, leads you directly to the right tools for your needs and crucially, the needs of everyone in your community too!

Here's how it works:

STEP 1: You come up with the evaluation question you want to explore.
STEP 2: You choose between the different ways in which people could help you explore it.
STEP 3: You choose between the different motivations people may have for doing so.
STEP 4: You choose between the different numbers of people you could work with.
STEP 5: You make sure there's nothing in the way which could stop them.

Bring it all together, and you're led to all of the evaluation tools and approaches which fit your circumstances best, accompanied by simple summaries to help you choose which ones feel right for you – each one underpinned by clear instructions, helpful templates and respected methodologies. You can go from not-a-clue to a full plan in less than an hour, and once you've finished, a checklist is provided to help you confirm your choices. Our handy reporting card can then be used to capture everything you learn along the way, and make sure you never stop improving!

Whilst this guide can be used by anybody, it will work best when each step forms the basis of a discussion with your team or better still, with your community! To help, conversation cards are provided, which you can print out and move around, getting your creative juices flowing.

This guide has been produced by Egin, and for anyone who receives an Egin Grant, using it will ensure you meet your monitoring and evaluation requirements. It was developed through an extended period of 'co-design', bringing together members of the Egin Team, the National Lottery Community Fund team, professional evaluators and representatives of the communities we hope will benefit from using it: all coordinated by Co-production Lab Wales.

STEP 1: What

What is your evaluation question?

If you don't ask the right question you won't get the right answer!

Start by reflecting on all those things you would love to learn about: that's the stuff you will test, measure and explore through your evaluation. You may have one big evaluation question, or lots of little ones – and you may want to evaluate each question in a slightly different way.

Think about:

- **What** you want to know.
- **Why** it's important for you to know it.
- **When** the changes you're looking for might have happened.
- **Who** those changes will have happened for.
- **How** you will use all the things your find out.

Have you made an action plan with Egin?
If you have, your evaluation questions may simply ask whether each of your intended outcomes has been achieved.

It doesn't need to be too clever. Often a few simple, open questions work best, but no matter what evaluation method you use, the questions you ask will determine exactly what you find out – so take your time to get them right.

Write your evaluation questions down, and remember them for later!

USE CARD SET 1

(Go to Page 13)

Card Set 1 contains lots of the words you might use when evaluating a sustainability project. Use them to create different kinds of question. Do any resonate with you and the things you'd like to learn?

How

did

the project

change

levels of

cycling

amongst

young people

?

Add your own words, or extra cards and fill in the gaps to create your questions.

STEP 2: How

How can people help you to evaluate?

How can people help you to explore your evaluation question?

Your people are your greatest asset. Your staff, volunteers, customers, visitors and extended communities are the ones who really know better than anyone how things are going, the difference they're making, and how they could make an even bigger difference in the future.

That's why its so important that the people you work with are given simple and meaningful ways to help you.

A. You don't really know what you're looking for. It's all brand new, and people can help you to explore, discover and begin to understand what's happening, how and why.

B. You have some idea what you're looking for. You have made some assumptions about the changes you think you're making, and people can help you to test these, and refine them, to ask better questions in the future.

C. You know what you're looking for. You've been doing this for a long time, but people can still help you to fine tune your ways of working, and come up with new ideas.

You might feel that you're in all three categories, with different evaluation questions, different people and different bits of your work. That's fine! It just means that you may want to choose a few different evaluation tools in combination, to learn everything you want to.

Write down your choice (or choices), A, B or C and remember it for later!

USE CARD SET 2

(Go to Page 17)

Card Set 2 contains illustrated summaries of each of your three options, to aid your discussions. Use the evaluation questions you defined in Step 1 to focus your discussions.

Does any of the three options jump out as the one which describes your work best?

STEP 3: Why

Why will people help you evaluate?

Evaluation will work best when people want to do it!

Understanding the reasons people might have for wanting to help you learn, will allow you to find ways of involving them which are a good fit for their interests, enticing for them to take up, and fun for them to do. Again, what the right way looks like, will depend on which of the following three describes the people you want to involve in your evaluation best:

D. **The people you want to involve really care about this stuff. They share your vision and goals, and will want to do all they can to help you achieve success, together.**

E. **The people you want to involve are glad that you're here, and will be happy to give you a helping hand along the way as you work to achieve your goals.**

F. **The people you want to involve don't know you too well just yet. You think they will be happy to share their experiences when they see you though, so long as it's easy to do!**

People can mean anyone, from your staff through to those who live and work in the area where your activities take place.

You might find that your answers are different for the different groups of people you want to involve. Once again, all this means is that there will be more than one way that people can help you to learn.

Write down your choice (or choices), D, E or F and remember it for later!

USE CARD SET 3

(Go to Page 19)

Card Set 3 contains illustrated summaries of each of your three options. You might find it helpful to discuss different groups of people in turn (staff, volunteers, visitors, and so on!).

Which option to most of the people you want to involve fall into?

STEP 4: Who

Who are the people you hope to evaluate with?

You can learn a lot from one person you know well, and a thousand people you've never met.

With a rough sense of how many people you will likely involve in your evaluation, and how well you know them, you can make sure you have the right plans in place to learn as much as possible, in a way which doesn't spiral out of control.

Which of the following describes the activity you will be evaluating best?

1. **You've been doing this for a while. Lots of people are involved, they know you really well and you know them really well. You feel closely connected to your community.**
2. **The number of people involved is small, but growing. You've only met most people briefly, if at all, and you are still growing your community relationships.**
3. **This is all new. The only people involved at the moment are your team.**

Being 'involved' in your activities can mean anything from helping to design and deliver them, to being a customer, or benefiting from the wider impact of their taking place.

Of course, the number of people involved, and how well you know them will likely change over time, or be a bit different for each of your activities. All this means is that the way you learn some things, at some times, will be different to the way you learn other things at other times.

Write down your choice (or choices), 1, 2 or 3 and remember it for later.

USE CARD SET 4

(Go to Page 21)

Card Set 4 contains illustrated summaries of each of your three options, to aid your discussions.

Which option best describes you now? Which do you think will best describe you a year from now?

STEP 5: Who

What could stop people from helping you?

What could stop people from taking part in your evaluation activities?

No two people are the same. The people you employ, who volunteer with you, who use your services, who take part in your activities and who live and work within your community will have a huge diversity of interests, needs and preferences.

Making sure you hear from all corners of your community will give you a deeper understanding of how things are really working, and the difference you're really making.

All to often, those you need to hear from the most, will be those who face the biggest barriers to taking part. Breaking down barriers means making sure people can speak to you in places where they feel comfortable, using words they understand, at times which suit them, about things which matter to them. If people are being asked to give you lots of their time, you should consider the financial implications of this for them too.

Co-production is key!
Don't worry if you haven't got all the answers. You can't! By working with partners, and directly with your communities, you can find simple solutions together.

And a good starting point is to always keep things as simple as you possibly can!

What are the main barriers people could face to taking part in your evaluation activities?

What can you do to remove them?

USE CARD SET 5

(Go to Page 23)

Card Set 5 contains examples of things which could be barriers to involvement for some people. Discuss each in turn. If anything is missing, add it in!

- The language I speak
- How confident I am using a computer
- My reading age
- My ability to travel

Which will be the greatest barriers the people you want to involve in your evaluation? How can you remove them?

Pulling it all together

Finding the right tools for your needs

Once you have completed each of the 5 Steps it time to find the evaluation tools and approaches which are the best fit for your needs, and the needs of your community.

Follow the instructions below to be led directly to a breakdown of your options:

AD	If you selected A and D (and either 1, 2 or 3) you will be exploring and discovering, in partnership with your evaluation participants.	Go to Page 26 to find out more
AE	If you selected A and E (and either 1, 2 or 3) you will be exploring and discovering, helped along the way by your evaluation participants.	Go to Page 27 to find out more
AF	If you selected A and F (and either 1, 2 or 3) you will be exploring and discovering, with insight from your evaluation participants.	Go to Page 28 to find out more
BD	If you selected B and D (and either 1, 2 or 3) you will be testing your assumptions, in partnership with your evaluation participants.	Go to Page 29 to find out more
BE	If you selected B and E (and either 1, 2 or 3) you will be testing your assumptions, helped along the way by your evaluation participants.	Go to Page 30 to find out more
BF	If you selected B and F (and either 1, 2 or 3) you will be testing your assumptions, with insight from your evaluation participants.	Go to Page 31 to find out more
CD	If you selected C and D (and either 1, 2 or 3) you will be tweaking and refining, in partnership with your evaluation participants.	Go to Page 32 to find out more
CE	If you selected C and E (and either 1, 2 or 3) you will be tweaking and refining, helped along the way by your evaluation participants.	Go to Page 33 to find out more
CF	If you selected C and F (and either 1, 2 or 3) you will be tweaking and refining, with insight from your evaluation participants.	Go to Page 34 to find out more

If you chose multiple options at each step, follow all the results, to see how they compare.

Making Sure

A simple checklist

It's always good to make sure before you start!

Once you have completed Steps 1 to 5 for each of your evaluation questions, and chosen the evaluation tools and approaches you would like to use, use the checklist below to confirm your decision, and make sure you haven't forgotten anything important.

Our evaluation question is (or our evaluations questions are)	
Our selected evaluation tools and approaches are	

Our evaluation question will help us to learn, improve the things we do, and the difference we make.	X
The ways people will be involved in our evaluation will be helpful and meaningful for us.	X
The ways people will be involved in our evaluation will be helpful and meaningful to them.	X
Our evaluation tools and approaches are a good fit for the number of people we hope to involve.	X
We will be able to remove the barriers which could stop people from taking part in our evaluations.	X
We have all the skills, time and support we need to put these evaluation tools and approaches into practice.	X

Add further details about your choices here

Visit the dedicated 'Proving & Improving' space in the Egin Online Community to complete your checklist online:
https://egin.community/topics/36589/media_center/

Harvest time

A simple report card

The most important thing about any evaluation is that it's useful.

To make sure you keep learning, and keep improving, as you evaluate, take time every now and again to take stock of what you've done, what you've learned, and what you're going to do next. Try and do this at least every few months, and start as soon as you can – evaluation isn't the thing you do at the end, it's the thing that supports you along the way!

You should reflect upon:

What you did
Think about all the evaluation methods and tools you've been using. • *What questions did you ask, who did you ask them to, and how did you ask them?* • *What did people really like, and what did they struggle with?* • *Was it harder or easier than you expected?*
What you found out
Think about all the things that your evaluation results have taught you. • *Where are you making the most progress, and the biggest difference.* • *Where are you struggling, making slow progress and encountering challenges?* • *Has anything surprised you and if so, why?*
What you're going to do about it
Think about all the things that you will do next. • *How, if at all, with you change the way you evaluate going forward?* • *How, if at all, will you make changes to your activities going forward?* • *When will you next get together to revisit these questions?*

Visit the dedicated 'Proving & Improving' space in the Egin Online Community to access our digital report card to log and track your progress over time: https://egin.community/topics/36589/media_center

The Cards

AN EVALUATION CANVAS

I'll work best printed out on A3 paper (or bigger)!

WHAT?

Our evaluation question

- *Place your selected cards from Card Set 1 here*
- *Place your selected cards from Card Set 1 here*
- *Place your selected cards from Card Set 1 here*
- *Place your selected cards from Card Set 1 here*
- *Place your selected cards from Card Set 1 here*

HOW? The way people can best help us

Place your choice from Card Set 2 her

WHY? Why people will want to help us

Place your choice from Card Set 3 her

WHO? The people we will be evaluating with

Place your choice from Card Set 4 her

WHO?

The barriers which could get in people's way

- *Place your choices from Card Set 5 here*
- *Place your choices from Card Set 5 here*
- *Place your choices from Card Set 5 here*
- *Place your choices from Card Set 5 here*

CARD SET 1

WHO	CHANGE	INCREASED
WHAT	HELP	DECREASED
WHEN	IMPACT	GOT BETTER
HOW	EFFECT	GOT WORSE
WHY	RESULT	IMPROVED

GO BACK TO STEP 1 (Page 3)

CARD SET 1

Page 2 of 4

THE PROJECT	CONFIDENCE	BEHAVIOUR CHANGE
THE ACTIVITY	KNOWLEDGE	CO-BENEFITS
THE SERVICE	EXPERIENCE	CARBON EMMISSIONS
THE WORK	AWARENESS	CLIMATE CONVERSATION
THE IDEA	FEELINGS	WORKING TOGETHER

GO BACK TO STEP 1 (Page 3)

CARD SET 1

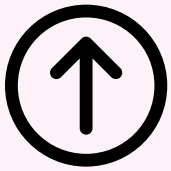
Page 3 of 4

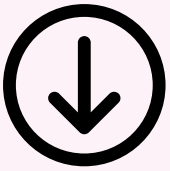
INDIVIDUALS	PEOPLE WITH DISABILITIES	PEOPLE WHO USE CARS
PARTNERS	GLOBAL MAJORITY COMMUNITIES	PEOPLE WHO USE PUBLIC TRANSPORT
COMMUNITIES	CARERS	_____
YOUNG PEOPLE	FAMILIES	_____
PEOPLE IN LATER LIFE	SCHOOLS	_____

GO BACK TO STEP 1 (Page 3)

CARD SET 1

Page 4 of 4





[GO BACK TO STEP 1 (Page 3)]

CARD SET 2

Page 1 of 2

A

We don't really know what we're looking for. It's all brand new, and people can help us to explore, discover and begin to understand what's happening, how and why.

B

We have some idea what we're looking for. We have made some assumptions about the changes we think we're making, and people can help us to test these and refine them, to ask better questions in the future.

C

We know what we're looking for. We've been doing this for a long time, but people can still help us to fine tune our ways of working, and come up with new ideas.

GO BACK TO STEP 2 (Page 4)

CARD SET 2

Page 2 of 2

A

This is new.

We are discovering.

B

We have some ideas.

We are testing.

C

We know what is happening.

We are measuring.

GO BACK TO STEP 2 (Page 4)

CARD SET 3

D

The people we want to involve really care about this stuff. They share our vision and goals, and will want to do all they can to help us achieve success, together.

E

The people we want to involve are glad that we're here, and will be happy to give us a helping hand along the way as we work to achieve our goals.

F

The people we want to involve don't know us too well just yet. We think they will be happy to share their experiences when they see us though, so long as it's easy to do!

GO BACK TO STEP 3 (Page 5)

CARD SET 3

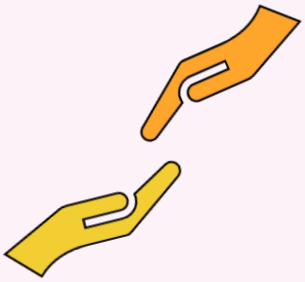
Page 2 of 2

D

People share our dreams.

We will do it together.

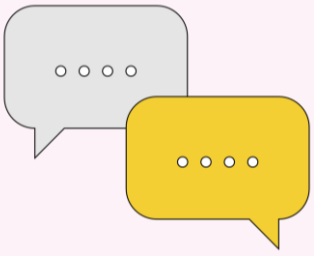
E



People support our dreams.

They will help us.

F



People have just met us.

They will tell us how they feel.

GO BACK TO STEP 3 (Page 5)

CARD SET 4

Page 1 of 2

1

We've been doing this for a while. Lots of people are involved, they know us really well and we know them really well. We feel closely connected to our community.

2

The number of people involved is small, but growing. We've only met most people briefly, if at all, and we are still growing our community relationships.

3

This is all new. The only people involved at the moment are our team.

GO BACK TO STEP 4 (Page 6)

CARD SET 4

Page 2 of 2

1

We know lots of people.

2

We know some people.

3

There is only us.

GO BACK TO STEP 4 (Page 6)

CARD SET 5

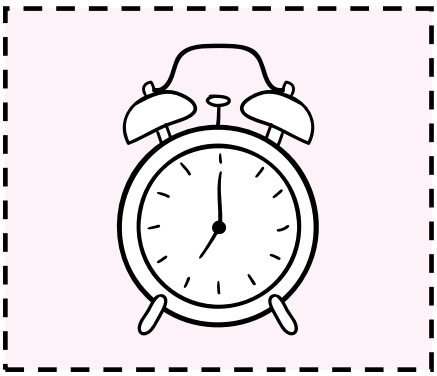
Page 1 of 2

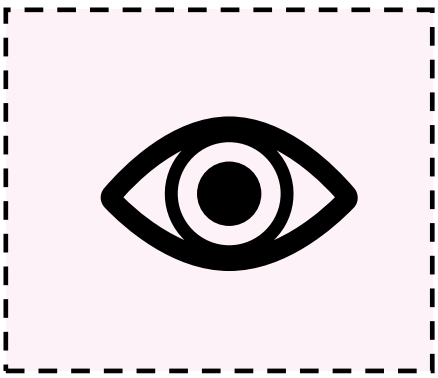
THE LANGUAGE I SPEAK	MY HEARING AND VISION	MY LACK OF CHILDCARE
HOW CONFIDENT I AM USING A COMPUTER	MY CONFIDENCE WITH NUMBERS	_____
MY READING AGE	MY SOCIAL ANXIETY	_____
MY ABILITY TO TRAVEL	THE HOURS I WORK	_____

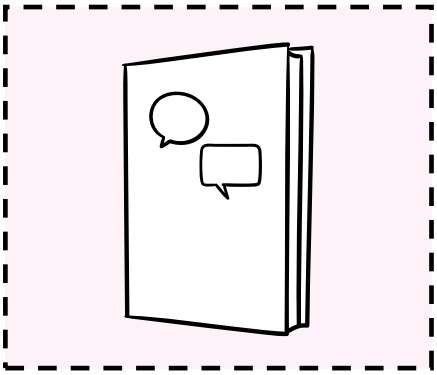
GO BACK TO STEP 5 (Page 7)

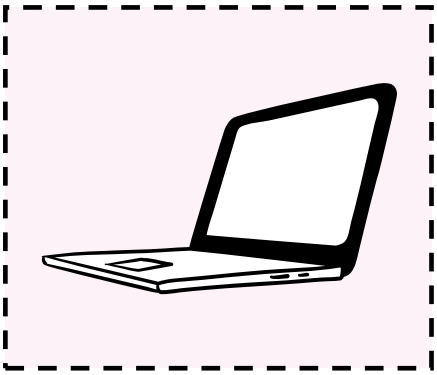
CARD SET 5

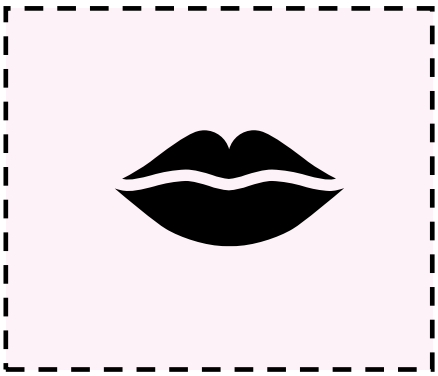
Page 2 of 2

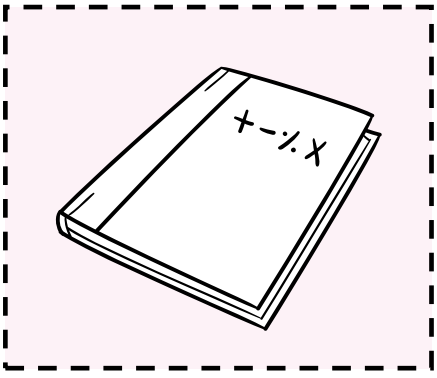












GO BACK TO STEP 5 (Page 7)

The Results

AD

Exploring and discovering, in partnership with your evaluation participants

The following evaluation tools and approaches are just some of those that look like they might be a good fit for your needs, and the needs of your community.

Below, each is categorised according to who it will work best with (remember your choices from Step 4!), whether it is more about stories (qualitative) or numbers (quantitative), and how hard it is to do. Rest assured, nothing is listed which can't be done really well by someone who is completely new to evaluation, with a bit of patience. If you like the look of something, turn to the corresponding method guide for a detailed summary, and links to top quality resources to help you put it into practice.

Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Creative Writing	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 43
Key Informant Interviews	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep	Go to page 48
Open Space Technology	Some people Just option 1	More advanced Harder but worth it	Go to page 51
Appreciative Inquiry	Most people Options 1 and 2	More advanced Harder but worth it	Go to page 36
Most Significant Change	Most people Options 1 and 2	More advanced Harder but worth it	Go to page 49
Quantitative Methods (more about the numbers)			
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 59

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

AE

Exploring and discovering, helped along the way by your evaluation participants

The following evaluation tools and approaches are just some of those that look like they might be a good fit for your needs, and the needs of your community.

Below, each is categorised according to who it will work best with (remember your choices from Step 4!), whether it is more about stories (qualitative) or numbers (quantitative), and how hard it is to do. Rest assured, nothing is listed which can't be done really well by someone who is completely new to evaluation, with a bit of patience. If you like the look of something, turn to the corresponding method guide for a detailed summary, and links to top quality resources to help you put it into practice.

Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Appreciative Questions	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 37
Community of Enquiry	Most people Options 1 and 2	Not too bad Takes a bit of prep	Go to page 42
Open Space Technology	Some people Just option 1	More advanced Harder but worth it	Go to page 51
Most Significant Change	Most people Options 1 and 2	More advanced Harder but worth it	Go to page 49
Quantitative Methods (more about the numbers)			
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 59
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

AF

Exploring and discovering, with insight from your evaluation participants.

The following evaluation tools and approaches are just some of those that look like they might be a good fit for your needs, and the needs of your community.

Below, each is categorised according to who it will work best with (remember your choices from Step 4!), whether it is more about stories (qualitative) or numbers (quantitative), and how hard it is to do. Rest assured, nothing is listed which can't be done really well by someone who is completely new to evaluation, with a bit of patience. If you like the look of something, turn to the corresponding method guide for a detailed summary, and links to top quality resources to help you put it into practice.

Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Capturing Casual Moments	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 39
Observations	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 50
Emotional Touchpoints	Most people Options 1 and 2	Not too bad Takes a bit of prep	Go to page 45
Reflection	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 54
Quantitative Methods (more about the numbers)			
Primary Data	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 53
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

BD

Testing your assumptions, in partnership with your evaluation participants

The following evaluation tools and approaches are just some of those that look like they might be a good fit for your needs, and the needs of your community.

Below, each is categorised according to who it will work best with (remember your choices from Step 4!), whether it is more about stories (qualitative) or numbers (quantitative), and how hard it is to do. Rest assured, nothing is listed which can't be done really well by someone who is completely new to evaluation, with a bit of patience. If you like the look of something, turn to the corresponding method guide for a detailed summary, and links to top quality resources to help you put it into practice.

Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Stretch Statements	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 58
Tactile Feedback	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 60
Positive Deviance	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep	Go to page 52
Most Significant Change	Most people Options 1 and 2	More advanced Harder but worth it	Go to page 49
Quantitative Methods (more about the numbers)			
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 59
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

BE

Testing your assumptions, helped along the way by your evaluation participants.

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Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Relationship Maps	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 55
Case Studies	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep	Go to page 40
Focus Groups	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 47
Key Informant Interviews	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep	Go to page 49
Quantitative Methods (more about the numbers)			
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 59
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

BF

Testing your assumptions, with insight from your evaluation participants.

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Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Sticky Wall	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 57
Reflection	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 54
Observations	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 50
Fishbowls	Everyone Options 1, 2 and 3	More advanced Harder but worth it	Go to page 46
Quantitative Methods (more about the numbers)			
Primary Data	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 53
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

CD

Tweaking and refining, in partnership with your evaluation participants.

The following evaluation tools and approaches are just some of those that look like they might be a good fit for your needs, and the needs of your community.

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Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Tactile Feedback	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 60
Body Maps	Most people Options 1 and 2	Easy Peasy Start straight away	Go to page 38
Positive Deviance	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep	Go to page 53
Focus Groups	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 47
Quantitative Methods (more about the numbers)			
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 59
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

CE

Tweaking and refining, helped along the way by your evaluation participants.

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Below, each is categorised according to who it will work best with (remember your choices from Step 4!), whether it is more about stories (qualitative) or numbers (quantitative), and how hard it is to do. Rest assured, nothing is listed which can't be done really well by someone who is completely new to evaluation, with a bit of patience. If you like the look of something, turn to the corresponding method guide for a detailed summary, and links to top quality resources to help you put it into practice.

Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Choosing Pictures	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 41
Focus Groups	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 47
Key Informant Interviews	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep	Go to page 49
Reflection	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 54
Quantitative Methods (more about the numbers)			
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 59
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

CF

Tweaking and refining, with insight from your evaluation participants.

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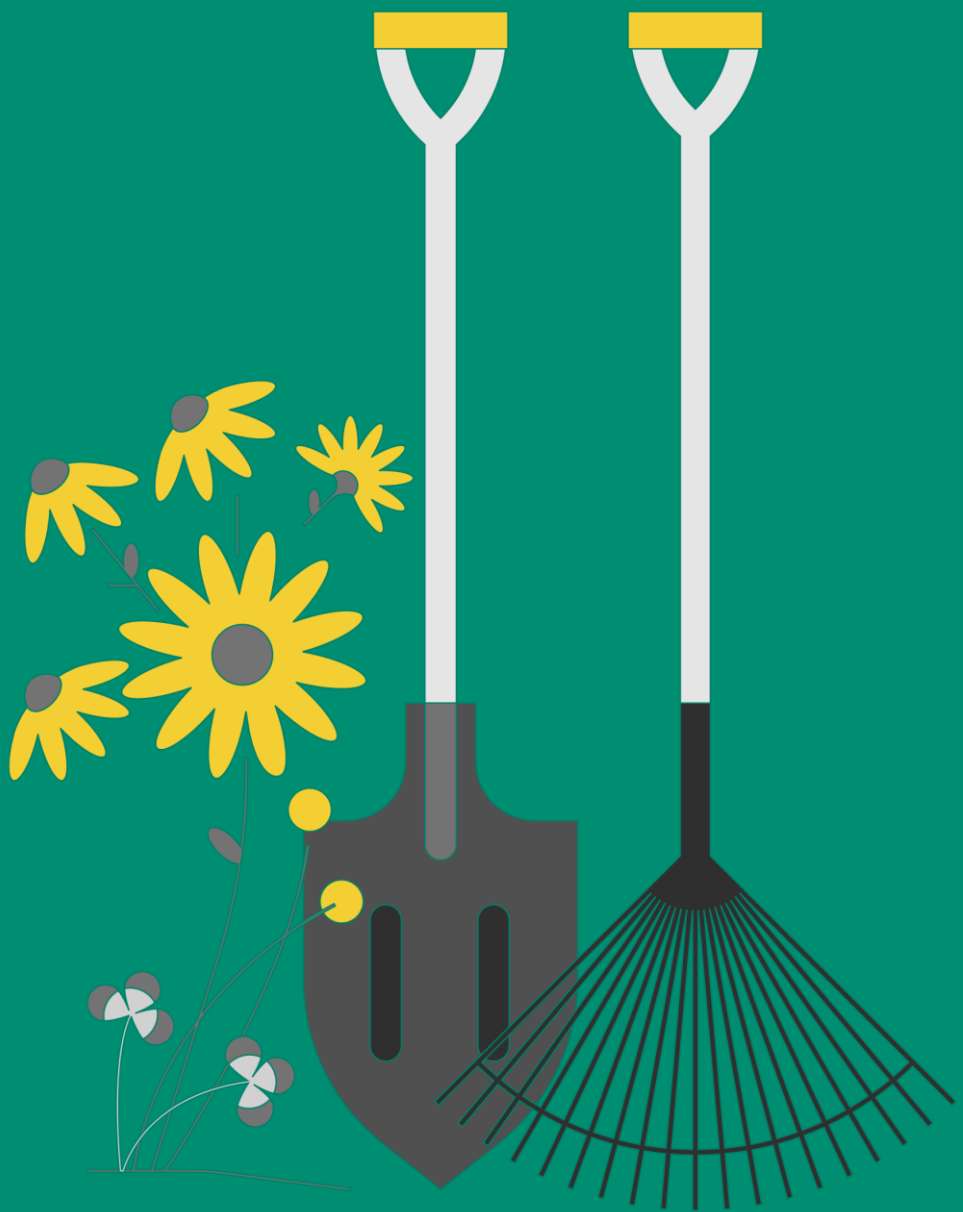
Tool/Approach	Who is it for?	How hard is it?	Interested?
Qualitative Methods (more about the stories)			
Sticky Wall	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 57
Diaries	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 44
Focus Groups	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 47
Quantitative Methods (more about the numbers)			
Primary Data	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	Go to page 53
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	Go to page 56
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	Go to page 59

Mix your methods!
The best evaluations combine approaches. Aim to use at least one qualitative, and one quantitative tool/approach from this list.

REVIEW THE FULL LIST OF YOUR OPTIONS ON PAGE 61

The Tool Box



Appreciative Inquiry

Focus on what's strong, not what's wrong

Appreciative Inquiry is a participatory approach which focuses on what is working, not what isn't working.

The process brings together all of the people closely involved in a given project or activity, who work together to uncover strengths, identify opportunities and design ways forward by following a '5D Cycle':

1. **Define: You clarify the question or topic of inquiry**
2. **Discover: You identify and appreciate the strengths uncovered**
3. **Dream: You collectively envision a future**
4. **Design: You set out the actions needed to plan for the identified future**
5. **Deliver: You implementing the design**

As a collaborative process from the start, appreciative inquiry is great for securing community buy-in for learning, developing and taking positive action together.

Guides and Resources

This guide from **Taith** provides step-by-step instructions for delivering an appreciative inquiry exercise: http://www.taith.co.uk/wp_taith/wp-content/uploads/2015/07/gsJaAuTk6.pdf

Scottish Social Services Council with NHS Education for Scotland provide a comprehensive appreciative inquiry resource pack: https://lms.learn.sssc.uk.com/pluginfile.php/56/mod_resource/content/1/bcciw-flr-8.pdf

An Egin example …

An appreciative inquiry could be centred around 'widening participation in the climate conversation', bringing together a project team alongside a range of community representatives to build understanding of the barriers and opportunities different communities face to taking action, and the simple things which can be done to allow more people to get involved.

EGIN OUTCOME: People new to climate conversation

Co-Pro Rating ★★★

Appreciative Inquiries are great for co-production. They allow groups of key people from different background and positions to come together and collectively explore the strengths on which to build next steps.

Appreciative Questions

Simple and positive conversation starters

Appreciative questions are simple prompts for conversations about what's working well, and what could be working even better!

Appreciative questions can be used as part of informal, unstructured conversations, or as prompts within interviews, surveys or focus groups. The insights they generate can be recorded in any number of ways, including in writing, audio or video, but wherever possible direct quotes offered by people should be captured in place of summaries.

Asking appreciative questions doesn't mean ignoring or glossing over the challenges – it simply means starting with what's working well as an entry point to identifying solutions and areas for improvement.

Guides and Resources

Evaluation Support Scotland provide a simple introduction to using appreciative questions.
https://evaluationsupportscotland.org.uk/resources/appreciative-questions/

Alongside an accompanying template for capturing feedback.
https://evaluationsupportscotland.org.uk/resources/appreciative-questions-template/

An Egin example …

Appreciative questions could be used to explore how and why reduced carbon emissions are being observed more with some elements of a project, or community, than others. Simply asking 'what's working well' would reveal the hidden incentives, motivations and enablers of reduced emissions, and identify the tweaks and changes to delivery which can allow more people to reap the rewards of these.

EGIN OUTCOME: Reduced carbon emissions

Co-Pro Rating ★★★

Appreciative questions are great for co-production. They can be implemented in a whole host of scenarios, making them very inclusive, and provide simple opportunities for people to tell you what matters most to them, in their own words.

Body Maps

Creative exploration using your body as a tool!

Body Maps are a creative and interactive investigation into people's attitudes, beliefs, opinions and perceptions.

Starting by drawing an outline of a body, each participant is asked to use their outline to consider their own experiences. What they think (head); what they feel (heart); what they will take with them (hands) and so on. The method can draw upon both positive and negative experiences and enables freedom for participants to consider how their life has been affected. It can be used at any point in a project's delivery: at the beginning to baseline experiences, in the middle to capture change, and at the end of reflect on impact. .

Guides and Resources

Evaluation Support Scotland provide a simple introduction to Body Maps.
https://evaluationsupportscotland.org.uk/resources/body-map/

This resource from **Sage Publications** explains how to use Body Map as baseline activity to capture change.
https://study.sagepub.com/sites/default/files/Body%20Mapping.pdf

An Egin example …

This method could be employed to evaluate the co-benefits brought about in projects involving children and families. Starting with a primary benefit (for example, an emissions reduction scheme) as a theme, it could invite people to discuss and explore the different ways in which taking part in activities has impacted upon them, and the co-benefits this has delivered (for example, to their health and wellbeing), in a way which feels like a fun, creative engagement activity in its own right. Body outlines could be coloured in, annotated and decorated as a creative record of a project's impact.

OUTCOME: Co-benefits

Co-Pro Rating ★★☆

Body Maps are good for co-production. They enable people to explore their own, personal experience and to express themselves in an intuitive and accessible way. They can be used to support shared learning and the co-production of next steps.

Capturing Casual Moments

Recording changes as they happen

Capturing Casual Moments is about recording the actual words of staff, volunteers, community members or anyone else, as they are made, in a simple, non-formal way.

It is a method in which an evaluation team design a system to record people's words in real time This can be as simple as having a notebook at a front-desk to write down comments.

Capturing Casual Moments is a simple way to let people know that their voice matters, and it captures rich unbiased insight without pressure. It works best when combined with other methods, where words can be revisited, discussed and explored in greater detail. The words recorded can be easily grouped and connected to project outcomes, either by an evaluation each, or better still, as a collective exercise with those who made them.

Guides and Resources

Evaluation Support Scotland provide a short introduction to Capturing Casual Moments (along with a simple template for recording them!).
https://evaluationsupportscotland.org.uk/resources/capturing-casual-moments/

This **Barnwood Trust** blog discusses the role of 'sticky places' and the value of simple conversations in everyday settings where people feel most comfortable.
https://www.barnwoodtrust.org/blog/bumping-spaces-sticky-places/

An Egin example ...

Capturing casual moments could help to capture behaviour changes as they happen, no matter how small and simple, and over time, build a rich and nuanced 'theory of change' demonstrating the relationship between the little changes that occur day-to-day, and the longer-term and larger-scale changes they contribute to.

This theory of change could be developed with a community, as a participatory exercise.

EGIN OUTCOME: Behaviour Change

Co-Pro Rating ★★☆

Capturing Casual Moments is good for co-production. It enables rich insights to be captured, away from any pressure and influence, and ensures that everyone's voice can be heard. It can also serve as an activity to build connections within communities, with a focus on natural, everyday conversation.

Case Studies

Taking a closer look at something

Case studies provide an in-depth look at a single 'case' within a wider project, for example one community, one activity, or the journey of one individual.

As an evaluation tool, they can provide a detailed account of how something has, or hasn't worked in one set of circumstances, and allow for comparisons to be made between multiple case studies. They are often used as a story-telling and communication tool, to share and promote the outcomes and impacts of an activity, with funders, partners or communities.

The gathering of data and production of case studies may involve the use of other evaluation tools and approaches along the way, for example, surveys or interviews. They can be presented as written reports, or as audio or video case studies – whatever feels most appropriate for you and your audience. When complete, the case study should contain enough background information and context for the reader to interpret it correctly. A single example set out in a case study may be hugely insightful, but another case study may tell a completely different story.

Guides and Resources

NPC offer a good practice guide all about writing impact case studies.
https://www.thinknpc.org/resource-hub/the-cycle-of-good-impact-practice-case-studies/

Oxford Brookes University provide a range of examples of case studies being used in different contexts.
https://www.brookes.ac.uk/students/academic-development/online-resources/case-studies/

An Egin example …

A case study could be a powerful tool to tell the story of how a person joined the climate conversation for the first time. It could detail who they are, what was stopping them from joining the conversation before, and what has enabled them to now. Whilst every person and their circumstances are different, it would demonstrate what can be possible.

EGIN OUTCOME: People new to climate conversation

Co-Pro Rating ★★☆

Case Studies are good for co-production. Whilst they don't involve as many people as other methodologies, they still provide opportunities for the stories and experiences of communities and individual to be told, and for those people to be directly involved in their creation.

Choosing Pictures

Visual prompts for sharing feelings and experiences

Choosing Pictures is a simple technique where people select from and respond to a set of picture prompts.

People are shown a set of pictures, and are invited to select the picture which stands out to them, when reflecting on their feelings and experiences regarding a particular subject or activity. They are then asked to share why they made their selections, instigating a reflective discussion. This process can be repeated several times with different questions to consider, and if desired, different pictures serving as prompts.

Pictures can be anything: photos taken during the delivery of an activity, cuttings from the local paper, or generic stock images representing different emotions, themes and ideas.

Choosing pictures is a highly accessible an interactive way of evaluating. It is an effective way to prompt the conversations that can lead to deep insight and learning, and can be used again and again to capture changes over time: from the beginning of a project to the end.

Guides and Resources

This guide from **Evaluation Support Scotland** provides step-by-step instructions for Choosing Pictures. https://evaluationsupportscotland.org.uk/resources/choosing-pictures/

Unsplash is an online archive of free stock photos, which could be used as prompts for a choosing pictures activity. https://unsplash.com

An Egin example ...

The choosing pictures methodology could be used to help build understanding of the barriers and enablers which are impacting on the reduction of carbon emissions for a given group or community. Picture prompts could include pictures of campaign posters, event scenarios or newspaper headlines, and build understanding of which are most effective in incentivizing actions, and the ways in which they work for different people.

EGIN OUTCOME: Reduced carbon emissions

Co-Pro Rating ★★★

Choosing Pictures is great for co-production. It's super accessible and allows people to easily and safely express their feelings and experiences, prompting discussions which enable shared learning, relationship building and the co-production of next steps.

Community of Enquiry

Great for exploring the big questions

A Community of Enquiry is a facilitated open discussion which allows a group to explore ideas, ask questions, listen actively and draw conclusions together.

Rather than starting with a problem to be solved, a Community of Enquiry starts only with broad theme to discuss. Following a simple 10-step process, Communities of Enquiry can be used at the very beginning of a project to generate ideas and establish priorities, during a project to discuss and respond to live challenges and opportunities, or after a project to reflect on impacts and next steps. Importantly, through their conversational nature, they can help to build trust and relationships, within organisations and across extended communities.

A Community of Enquiry can work with any audience, a team of staff and volunteers, a community you know well, or people who you've just met, but to work best, roughly 20 people should be involved in a single session.

Guides and Resources

This guide from **Iriss** provides step-by-step instructions for hosting a Community of Enquiry.
www.iriss.org.uk/sites/default/files/2018-03/iriss-community-of-enquiry-march18.pdf

This **Social Research Association** blog documents their experience of hosting a Community of Enquiry on theme of 'meaningfully measuring change in public service delivery.
www.the-sra.org.uk/SRA/Blog/Findinghiddentreasuresinpublicserviceevaluation.aspx

An Egin example ...

A community of enquiry could bring together a diverse group of people directly or indirectly involved in an Egin supported project, to explore the co-benefits a project has delivered within a given geography. Through the co-creation of discussion questions, and exploratory nature of the discussion, it would allow the unexpected and unintended consequences of any activity to be identified, and help the group to collectively set out the next steps they would like to see happen.

EGIN OUTCOME: Co-benefits

Co-Pro Rating ★★★

Communities of Enquiry are great for co-production. They allow groups to collectively co-define what they want to discuss, people to talk freely and safely about the things which matter most to them, and trust and relationships to form naturally.

Creative Writing

The possibilities are endless

Creative writing, whether in the form of poems, stories or anything else, can be a great way for people to share their feelings, experiences and look at a something with a completely fresh pair of eyes.

People can be asked to produce a piece of creative writing as a personal task or as a group activity. They may be given clear instructions (for example 'Write an imaginary diary entry from the perspective of someone who … ', 'Write a poem about a time when you have felt … ') or simply invited to 'write about their experiences'.

Each piece of writing will be valuable and insightful in its own right, and collectively, they may reveal over-arching trends and themes. If repeated regularly over time, creative writing activities may uncover some of the long-term impact a project is delivering, or map to a project's intended outcomes.

In reporting, creative writing pieces can be analysed and summarised, but can also be exhibited or performed, provoking responses and stimulating discussion.

Guides and Resources

Evaluation Support Scotland provide an introductory guide to using creative writing as an evaluation tool.
https://evaluationsupportscotland.org.uk/resources/creative-writing/

The **FLiNT project** used a creative writing exercise 'Postcards from the Future' to evaluate the potential impacts of climate change on different community groups in Wales.
https://flint.org.uk/inequalities-in-a-future-wales/

An Egin example …

A creative writing exercise (focused on a specific theme) could take place before, during and after an activity or project takes place, and the difference between pieces created at different times compared and contrasted.

This could form the basis for a conversation, exhibition or event, where the significance of these differences is presented and explored.

EGIN OUTCOME: Behaviour change

Co-Pro Rating ★★★

Creative Writing is a great foundation for co-production. It's accessible, participatory, and empowers and amplifies the voices of communities. Not only does it generate insight, but it organically fosters conversation, relationship building, and empathy.

Diaries

The whole story – in little bits

Diaries, logs and journals capture project progress, achievements, struggles, feelings and reflections as they happen, and over time build up an incredibly rich picture of what's been happening, why and how.

Diaries can be kept by anyone connected with an activity – a project manager, volunteer, or service users, and they can be used to stimulate conversation, support reflection, and compare and contrast experiences. They can focus on a specific theme, or capture anything and everything.

Diaries can take many different forms. From a good old fashioned notebook, to a structured template, spreadsheet or digital whiteboard.

Guides and Resources

BetterEvaluation provide an introduction to the use of diaries as an evaluation tool.
https://www.betterevaluation.org/methods-approaches/methods/logs-diaries

Diarium is just one example of an app designed to support diary keeping.
https://diariumapp.com/

An Egin example …

A diary may be maintained by a community group member, documenting the group's progress with respect to bringing new people into the climate conversation.

At the end of the project, the diary may provide insight into the tipping points, enablers and barriers that correspond with the project outcomes, building understanding of why and how they were achieved.

EGIN OUTCOME: People new to climate conversation

Co-Pro Rating ★☆☆

Diaries are okay for co-production. Whilst typically a solitary exercise, diary can enable rich discussion between many different people, and giving community members the opportunities to keep diaries of their experiences can help to capture and elevate their voices.

Emotional Touchpoints

The key moments in a person's journey

The Emotional Touchpoints approach invites people to identify and talk about the moments in their personal experience which have had the biggest emotional impact on them: good or bad, expected or unexpected.

In this method a team will 'map out' a journey of a project, for example: introductory meetings > training workshops > specific events and so on. Participants will then be shown the map and asked to pick out which parts of the journey stand out to them, and to share why that selection feels significant. This enables individual experience to remain a consistent focus in the evaluation. Participants have control over which parts of the journey to talk about and freedom to identify and explore why those parts are important.

The method can be used with a more directive approach too; participants can be asked to identify only positive, or only negative, parts of the journey to enable exploration of opportunities and barriers from the contexts of different individual experiences.

Guides and Resources

Evaluation Support Scotland provide a short introduction to the Emotional Touchpoints Approach.
https://evaluationsupportscotland.org.uk/resources/emotional-touchpoints/

The Alzheimer's Society provide a guide to using Emotional Touchpoints with people living with dementia.
https://www.alzheimers.org.uk/dementia-professionals/dementia-experience-toolkit/research-methods/emotional-touchpoints

An Egin example …

The emotional touchpoints approach could be used to identify which elements of a project, helped or hindered a project's ability to reduce carbon emissions.

This could reveal that the things assumed to be having the biggest impacts were quite inconsequential, whereas some tiny and subtle details were hugely important to whether or not the intended outcomes were to be achieved.

EGIN OUTCOME: Reduced carbon emissions

Co-Pro Rating ★★★

Emotional Touchpoints are great for co-production. They encourage a person-centred conversation which focused on the aspects of a service or experience which matter most to the individual, with out making any assumptions.

Fishbowls

Involved, but from a safe distance.

Fishbowls are events where a small group of people, with a lot to share and a big interest in doing so, participate in an activity, whilst a larger group only observe.

By opening what would otherwise be a closed discussion to a wider audience, fishbowls can make evaluate processes less mysterious and more transparent, give communities insight into what is being learned and how decisions are being made, and raise awareness of issues. The audience may be completely cut off from those inside the 'fishbowl' or may have the opportunity to get involved, for example by asking a question, or taking part in a vote.

Fish-bowls can take place in person (for example, with a discussion taking place in the presence of an audience on stage or in a large room) or online, for example, through a Zoom meeting or live streamed event.

Guides and Resources

BetterEvaluation provide a short introduction to the Fishbowl technique.
https://www.betterevaluation.org/methods-approaches/methods/fishbowl-technique

UNICEF provide a simple and practical guide to getting the best out of a Fishbowl event.
https://sites.unicef.org/knowledge-exchange/files/Fishbowl_production.pdf

An Egin example …

A fishbowl event could invite a small group of people from different organisations, sectors and with diverse lived and professional experiences to explore and discuss the co-benefits brought about by a given project or activity.

The virtual or in-person audience could interact through simple votes, building understanding of the extent to which these co-benefits are recognised by others, and suggest wider potential co-benefits warranting further investigation.

EGIN OUTCOME: Co-benefits

Co-Pro Rating ★★☆

Fishbowls are good for co-production. Whilst not everyone is directly involved, they create a safe and accessible way for more people to connect with your evaluations, and those who only observe this time may develop the interest and confidence to be active participants next time.

Focus Groups

Guided discussions small group

Focus groups are facilitated discussions between an invited group of people, relating to any aspect of an activity's development, delivery or impact.

Usually taking a set theme, and set questions as their starting point, unlike one-to-one interviews focus groups not only let their participants share their personal experiences directly, put to ask questions of, and bounce ideas off each other.

They typically involve 6-10 people, who may be picked at random (a random sample) or invited because of their particular perspective or experience (a judgement sample). They can take place at any point in an activity's delivery, or regularly throughout a project to explore changes as they occur.

Guides and Resources

NVCO provide a detailed introduction to running focus groups.
https://www.ncvo.org.uk/help-and-guidance/strategy-and-impact/impact-evaluation/measuring-your-impact/focus-groups/

BetterEvaluation provide a range of examples of Focus Groups in action.
https://www.betterevaluation.org/methods-approaches/methods/focus-groups

An Egin example …

A focus group could invite a small group of those involved in different aspects of the design and delivery of an activity (including project volunteers, participants, local businesses and residents) to come together to explore the behaviour changes the activity has brought about. Prompts could encourage both discussion of impacts and anticipated behaviour changes, as well as surprises and unexpected changes brought about.

EGIN OUTCOME: Behaviour Change

Co-Pro Rating ★★☆

Focus groups are good for co-production. Whilst their questions are typically set in advance, and they only involve a small sub-set of your community, they still provide opportunity for a detailed and rich discussion, where every member of the group can share their views freely and openly.

Key Informant Interviews

In depth discussions with those who know you best

Key informant interviews are in-depth interviews with people who have a particularly well informed perspective on a project or activity.

Key informant interviews typically have a light-touch structure, with the interviewer using prompt in any order, as opposed to formal questions in a strict order – this enables more natural conversation – with a free flow of information, ideas and insight.

These kind of conversations are great for capturing unexpected changes and impacts, they can be done with limited resources and can offer valuable insight into the 'big picture.'

Guides and Resources

BetterEvaluation provide an introduction to conducting key informant interviews.
https://www.betterevaluation.org/methods-approaches/methods/key-informant-interviews

The University of Washington provide free access to a Key Informant Interview Handbook.
https://courses.washington.edu/nutr531/HEBD/KIInterviews/KeyInformantInterviewHandbook.pdf

An Egin example …

Key informant interviews could invite a selection of community representatives with in-depth knowledge and experience, to provide insight into the barriers and opportunities associated with bringing new people into the climate conversation. A mixture of those at different points in their journey (not yet engaging, making a start, and having make huge progress) could take part, allowing a detailed 'theory of change' to be developed.

EGIN OUTCOME: People new to climate conversation

Co-Pro Rating ★★☆

Key Informant Interviews are good for co-production. Whilst typically only involving a small number of people, they allow those people to share rich feedback and insights with relation to the personal experiences.

Most Significant Change

Learning through sharing stories

Most Significant Change is participatory monitoring and evaluation approach that involves the collecting and selecting of 'stories' from people with wide ranging perspectives on a project or activity.

Most Significant Change allows people to share, in their own words, what matters most to them, and for these words to directly inform strategic decision-making. Through a structured 10-step process, the changes which a project or activity have brought about are collected, co-analysed, and recommendations for the future co-defined. A Most Significant Change exercise can be run regularly throughout the duration of a project, supporting continuous learning as a project develops. It's a great way to get people talking, build relationships, and capture the unexpected changes which a project is bringing about as they occur.

Guides and Resources

The **developers** of the Most Significant Change technique provide a detailed instruction manual for its use. https://www.mande.co.uk/wp-content/uploads/2005/MSCGuide.pdf

This **Anecdote** blog provides a case study of the Most Significant Change technique in action. https://www.anecdote.com/2006/04/evaluating-soft-stuff/

An Egin example ...

A Most Significant Change exercise could be run to help understand the relative significance of different aspects of a project with respect to reducing carbon emissions. Stories could be gathered from the people the project has targeted, exploring changes to their behaviour, knowledge, confidence, or otherwise. Project leaders, alongside other local policy and decision-makers could then support co-analysis of these stories, reflecting on the extent to which their decisions have helped or hindered this process, and what would need to change to enhance project impacts in the future.

EGIN OUTCOME: Reduced carbon emissions

Co-Pro Rating ★★★

Most Significant Change is great for co-production. Its open, flexible, inclusive, can be adapted to suit the needs of any group, and involves people at every stage of the evaluation process, from gathering data, to analysis and deciding what should happen next.

Observation

Saying what you see

Observation simply means looking at the things people are doing as they engage with a project or activity, and capturing this in a structured way.

Observations can be recorded ad hoc and informally throughout the full delivery of a project, or a set times, in set places. They can be 'casual observations', recording anything interesting or unusual that happens, or they can look for particular changes and indicators (for example, taking, smiling, etc.).

Project teams and volunteers can take on the role of observers, and a huge amount of rich information can be gathered over time.

Requiring not direct input from project participants, observation is very accessible, but its is important to reflect on, at any particular moment, whether being observed is something everyone will feel comfortable with, and if it could risk changing or having a negative impact on people's behaviour.

Guides and Resources

Evaluation Support Scotland provide a template for use in recording observations.
https://evaluationsupportscotland.org.uk/resources/observation/

The **NSW Government** (Australia) Education Department provide a guide to the use of observation in evaluation.
https://education.nsw.gov.au/teaching-and-learning/professional-learning/pl-resources/evaluation-resource-hub/collecting-data/observation

An Egin example ...

Observations could be a simple way to capture the co-benefits arising from a project, for example, the wellbeing benefits of an active travel project focused on reducing carbon emissions.

Very simple indicators of personal wellbeing (for example, smiling and laughing) could be recorded, and compared with other changes and impacts being achieved (whether measured through observation or in other ways).

EGIN OUTCOME: Co-benefits

Co-Pro Rating ★☆☆

Observation is okay for co-production. Whilst is doesn't directly involve people, it ensures the needs and experiences of those who may have all sorts of reasons for not being able to be directly involved in evaluation activities are still captured and inform decision making.

Open Space Technology

Self-organising meetings

An Open Space Technology event is a large group discussion with no set agenda.

The method involves people coming together for self-organised discussions, built around a particular theme. There are four principles at Open Space Technology events:

1. Whoever comes along are the right people
2. Whatever happens is the right thing.
3. Whenever it starts is the right time.
4. Whenever it finishes is the right time.

This flexibility makes Open Space Technology events highly accessible, and a great tool to support creative thinking and the development of new ideas.

Guides and Resources

Open Space World provide an introduction to Open Space Technology.
https://openspaceworld.org/wp2/hho/papers/brief-users-guide-open-space-technology/

Mind Provide a simple guide for running 'Open Space Technology' sessions.
https://www.mind.org.uk/media-a/4924/open-space-method.pdf

An Egin example …

An Open Space Technology event could help to explore the unexpected behaviour changes a project has brought about. Participants could suggest the behaviour changes they have personally experienced, with discussion groups forming around those most commonly cited. Through discussions, the nature and extent of these changes, and the relationships between them, could be explored, and documented.

EGIN OUTCOME: Behaviour change

Co-Pro Rating ★★★

Open Space Technology events are great for co-production. They allow lots of people to talking about what matters to them, in ways what matter to them, whilst building relationships with each other at the same time.

Positive Deviance

Building on local solutions

Positive deviance is a strengths-based approach, where you identify the things which are going really well, explore them, and build on them.

Within every community there will be individuals and groups who find simpler or more successful solutions to common challenges than those people around them. By working with these unusually successful individuals and groups (called 'positive deviants') we can learn from them, and develop new strategies so that more people, are able to be more successful more of the time.

Positive Deviance's community-based approach to learning and developing, and its focus on what's working, not what's broken, makes it a great tool for bringing people together to make real and positive changes, and overcome challenges which may have previously felt unsolvable.

Guides and Resources

The **Positive Deviance** Initiative offer a free 'Field Guide' to the positive deviance approach.
https://static1.squarespace.com/static/5a1eeb26fe54ef288246a688/t/5a6eca16c83025f9bac2eeff/1517210135326/FINALguide10072010.pdf

Cambridge University offer a detailed article exploring the positive deviance approach in action as part of their 'Elements' series.
https://www.cambridge.org/core/elements/positive-deviance-approach/506CA2D446210E1FE76740B7F835D87C

An Egin example ...

The positive deviance approach could help to bring new people into the climate conversation for the first time.

Groups who have very successfully connected with and involved new audiences in climate activities nationally, and wider activities locally, could be worked with, to help understand the under-lying principles behind this success, and what it would mean for these principles to be applied in a different context.

EGIN OUTCOME: People new to climate conversation

Co-Pro Rating ★★★

Positive deviance is great for co-production. It's a true asset-based approach, allowing the existing strengths of individuals and communities to be built upon, and solutions to be developed together.

Primary Data

Crunching the numbers

Primary data is all of that data that gathered through the course of running a project, which can simultaneously provide insight into how a project is working, and how it could work even better.

Primary data includes data gathered explicitly for evaluation purposes, for example, the raw data generated through a survey, but also, all that data gathered organically as activities are delivered (for example, financial data, attendance figures at events, and social media analytics), which can be just as useful for evaluation, monitoring, and learning. With simple, consistent ways of recording data, all sorts on analysis can be used to explore patterns and correlations – establishing performance baselines and identifying patterns and themes which can be further explored using other, complementary methods.

Guides and Resources

The **One Planet Centre** 'One Planet Standard Quick Guide to reducing your ecological footprint' contains practical advice and lots of examples relating to the simple data groups and small organisations can gather with respect to carbon emission, waste, water consumption and more.
https://oneplanetstandard.org/wp-content/uploads/2021/11/Quick-guide-to-footprint-reduction-households.pdf

An Egin example …

Examples of the really simple data which could be used by anyone to estimate and monitor carbon emission reductions delivered over the course of a project include: the amount of energy being used each month, the amount of waste (in weight or in big bags) being sent to landfill, the number of miles per day being driven by project teams and volunteers, the amount of recycled materials being used in activities, and so on.

EGIN OUTCOME: Reduced carbon emissions

Co-Pro Rating ★☆☆

Primary data is okay for co-production. It provides the baseline numbers which can help to establish benchmarks, provide context and validate and complement the rich and nuanced information gathered through qualitative (story-based) methods.

Reflection

Take a moment to stop and think

In the context of evaluation, reflection means a structured way of thinking about our experiences, feelings and ways of doing things.

Reflection can happen any time, any place, with any one - the only equipment you need to do it is your own mind. To help though, many frameworks, tools and facilitation techniques have been developed. Reflection can be a solo exercise, or a group activity. It can be self-directed, or led by a facilitator. It is an important evaluation tool in its own right, as well as a critical part of many other methods and approaches. Not only that, but personal and group reflections can be an important aspect of any activity, to maintain focus, generate learning, and protect and enhance wellbeing for all.

Guides and Resources

The **University of Edinburgh** provide a 'Reflection Toolkit' filled with tools and resources to support reflection in all its shapes and forms.
https://www.ed.ac.uk/reflection/reflectors-toolkit/reflecting-on-experience

This manual from **Care International**, provides detailed guidance on the use of a Monitoring, Evaluation, Reflection & Learning (MERL) tool primarily intended to support adaptive decision-making in communities vulnerable to climate change.
https://www.betterevaluation.org/sites/default/files/CARE_PMERL_Manual_2012.pdf

An Egin example ...

A simple group reflection exercise could help people identify and enhance the co-benefits being achieved through a project's delivery. Using Rolfe et al's 'Reflective Cycle' (What? So What? Now What?) a group could reflect on the co-benefits they have observed and experienced (what), the significance of these co-benefits (so what) and the things they should do next to enhance these benefits (now what).

EGIN OUTCOME: Co-benefits

Co-Pro Rating ★★★

Reflection is great for co-production. It's something everyone can be invited to do, in their own time and in their own way. Its accessible and inclusive and through sharing reflections people can build relationships, and understanding of one another's perspectives.

Relationship Maps

Understanding who we have around us

A relationship map is a simple way of visualising people's connection to one another, or to anything else.

The map takes the form of a target.

People are invited to place a mark on the target. The centre of the target represents them. They are invited to add marks to the target, representing other people, or things, and the closer to the centre they mark, they stronger a relationship or connection they feel to that person or thing. Relationship maps can be used regularly through the course of a project, indicating how relationships are evolving over time.

They are valuable in their own right, and also as conversation starters to prompt discussion and explore the reasons why relationships are changing.

Guides and Resources

Evaluation Support Scotland provide a method guide for anyone using 'Relationship Maps' as an evaluation tool.
https://evaluationsupportscotland.org.uk/resources/relationship-map/

An Egin example …

Relationship maps could be used to understand whether or not supportive peer networks are forming during the course of a project. People could add marks at the beginning, middle and end of a project, reflecting their relationship to the project team, each other, their local area and so on. The similarities and differences between the maps of each person, and the maps completed at different times, could form the basis of further reflection and discussion.

EGIN OUTCOME: Behaviour change

Co-Pro Rating ★★★

Relationship maps are great for co-production. They provide a simple and accessible way to build a people-focused conversation, and ensure any activity in underpinned by strong community relationships.

Social Media Analysis

What are people saying about you?

Social media provides a ready-made treasure trove of rich evaluation data.

Most of the people who work with you, use your products and services or come to your activities will use some form of social media. If your project has its own dedicated social media accounts, then these may provide a rich source of evaluation data. Useful data could include: the number and type of people you are connected with, the reach of your posts the number of positive and negative comments people are making with respect to your services and activities, and the key themes emerging in your comments, messages, or otherwise. Individual comments can also provide detailed insight with regards to each and every aspect of a project. Furthermore, social media channels can be utilised to stimulate conversations and promote and facilitate other evaluation approaches, such as polls and surveys.

Guides and Resources

NSF Consulting, based in Australia, provide a helpful blog all about the use of social media analysis as an evaluation tool.
http://nsfconsulting.com.au/social-media-monitoring-evaluation/

Evaluation Support Scotland provide a method sheet for anyone looking to use social media to support their evaluation activities.
https://evaluationsupportscotland.org.uk/resources/using-social-media-to-evaluate-other-activities/

An Egin example …

Social media analysis could be used to map and better understand how people new to the climate conversation are connecting with a project. Analysis could reveal how many people are engaging, who they are and when they started, allowing correlations with key project activities to be drawn.

EGIN OUTCOME: People new to climate conversation

Co-Pro Rating ★☆☆
Social media analysis is okay for co-production. Whilst not, in itself, a participatory process, social media channels are an accessible place where a large audience of those directly and indirectly involved in activities can offer open feedback on whatever they want.

Sticky Walls

Simple feedback in 10 seconds

As the name suggestions, a sticky wall is a wall onto which people can stick their feedback, in response to any question or prompt.

Sticky walls are a great way for people to provide feedback, in only a few seconds. At the end of a workshop for example a prompt could ask, 'what is the main thing you're going to take away from today?' People can add words, pictures, or short sentences of feedback and add them to the wall, quickly capturing rich evaluation data.

As more and more notes are added to a sticky wall, themes and sentiments can start to emerge, allowing quantitative analysis to be undertaken. If desired, analysis and organising of notes on the wall can be done as a group activity, supported by everyone who has added their notes to the wall. Sticky walls are particularly useful when lots of people are involved in activity, and over time, a wall may capture a huge amount of data, and reveal subtle details about how a project is working.

Guides and Resources

Evaluation Support Scotland provide a method sheet for the use of the Sticky Wall approach.
https://evaluationsupportscotland.org.uk/resources/sticky-wall/

An Egin example …

A series of community workshops promoting carbon reduction activities could use a sticky wall to ask 'what will you do as a result of coming along today?'. These 'public pledges' would provide insight into the extent to which the workshops were encouraging positive actions, inform what follow up evaluation activities should look like (to assess whether or not pledges were followed through), and as a public activity, they may encourage more people to be more ambitious in committing to do something.

EGIN OUTCOME: Reduced carbon emissions

Co-Pro Rating ★★★

Sticky walls are great for co-production. They are super accessible, allow everyone to have their say, and as feedback is on public display, they encourage openness and transparency in evaluation.

Stretch Statements

Positive conversation starters

Stretch statements are positive conversation starters, around which a reflective evaluation discussion can take place.

Examples of stretch statements include:

- I feel more confident about my abilities.
- I feel part of a community.
- I understand where I can go to for support

And so on.

In following the method, a set of statements is prepared, written onto cards (or displayed on a screen) and people are asked to select a statement which is meaningful to them, and explain the reasons for their choice.

Guides and Resources

Evaluation Support Scotland provide a helpful worksheet for anyone wanting to use stretch statements in their evaluation.
https://evaluationsupportscotland.org.uk/wp-content/uploads/2020/08/strethc_statements.pdf

An Egin example …

A set of stretch statements could be developed relating to a broad range of co-benefits it is anticipated that a project will be delivering for a community. Over time, the frequency with which statements are selected, and the reasons people provide for selecting them, will allow these assumptions to be tested, and the nature of the co-benefits better understood.

EGIN OUTCOME: Co-benefits

Co-Pro Rating ★★★

Stretch statements are great for co-production. They are super simple, any one can use them, and they let people talk about only about the things they feel comfortable to, and which matter most to them.

Surveys

Great for reaching lots of people

Surveys (alongside polls and questionnaires) invite a large group of people to respond to a common set of questions in order to build understanding of how people feel, what they want, and what the big picture looks like.

Surveys can be run online, conducted over the phone, or use paper forms. They can invite people to provide feedback in the form on written responses, ticks in boxes, or even drawing pictures. The larger the proportion of your audience or community who respond, the more 'representative' the survey will be – i.e., the more you can trust that the findings will likely apply to most people (even those who didn't complete it).

Surveys can allow huge numbers of people to provide feedback, in a way which is relatively straightforward to collate and analyse. The same survey can be translated into different languages, or completed in different ways by different people (for example, some completing online, and some using pen and paper). They can be contain lots of questions about all aspects of a project, or just a few simple questions which can be completed in a few seconds.

This flexibility makes them a commonly used part of many evaluations.

Guides and Resources

Harvard University offer a 'tip sheet' on question working for surveys.
https://psr.iq.harvard.edu/files/psr/files/PSRQuestionnaireTipSheet_0.pdf

This SurveyMonkey blog provides an introduction to different types of survey question and their various uses.
https://www.surveymonkey.co.uk/mp/survey-question-types/

An Egin example …

A survey could be issued to every person who took part in a waste reduction project, asking them to select the extent to which a range of behaviour change statements applies to them – for example 'I now wear more second hand clothing', 'I now use less plastic' and so on. As scale, these responses would build a detailed picture of the behaviour changes achieved.

EGIN OUTCOME: Behaviour change

Co-Pro Rating ★☆☆

Surveys are okay for co-production. They can allow everyone who has been involved in an activity to share their feedback – but crucially, precisely how good a survey is for co-production will come down to the questions that are asked, the way in which it is designed, where it is shared and how easy it is for people to respond.

Tactile Feedback

How does it feel?

Tactile feedback is a method which provides a very simple, accessible and non-verbal way for people to communicate how they feel about a subject, experience or activity.

Particularly useful when working with young people, those with visual impairments, or limited verbal communication skills (but equally great as a creative hands-on activity for any group), tactile feedback invites people to choose between objects with a variety of different textures in response to questions or topics, selecting the ones which most accurately reflect their feelings. A range of textures should be used, for example, soft things, spike things, shiny things, slimy things and so on. Equally, props may be used to help represent and introduce different themes (or example, a toy train to represent public transport). After introducing each theme or question to a group of people, they simply select an object. If willing and able to, they may share the reasons for their selections. The objects selected may be recorded or photographed, so if repeated over the course of a project, changes in selections can be analysed and interpreted.

Guides and Resources

Evaluation Support Scotland provide a simple guide to gathering Tactile Feedback.
https://evaluationsupportscotland.org.uk/resources/tactile-feedback/

An Egin example …

A group of school children taking part in a sustainability project for the first time could go around the school field and collect a range of textured items (pinecones, leaves, soil etc.). They could then create their own evaluation questions (for example, how does thinking about the climate emergency make you feel?) and use their items to reflect their feelings – and promoting them to share their thoughts. This could directly inform the nature of activities designed to support the young people in the future.

EGIN OUTCOME: People new to climate conversation

Co-Pro Rating ★★★

Tactile Feedback is great for Co-production. It's accessible to anyone, especially those who may struggle to communicate verbally and provides a simple and inclusive way for people to express their thoughts and feelings.

The Full List

All of them in one place

This is the complete list of every evaluation tool and approach contained within this guide. These aren't the only ones which exist – they're just the tip of the iceberg - but hopefully you'll find something that's perfect for you, and inspiration about how much is possible!

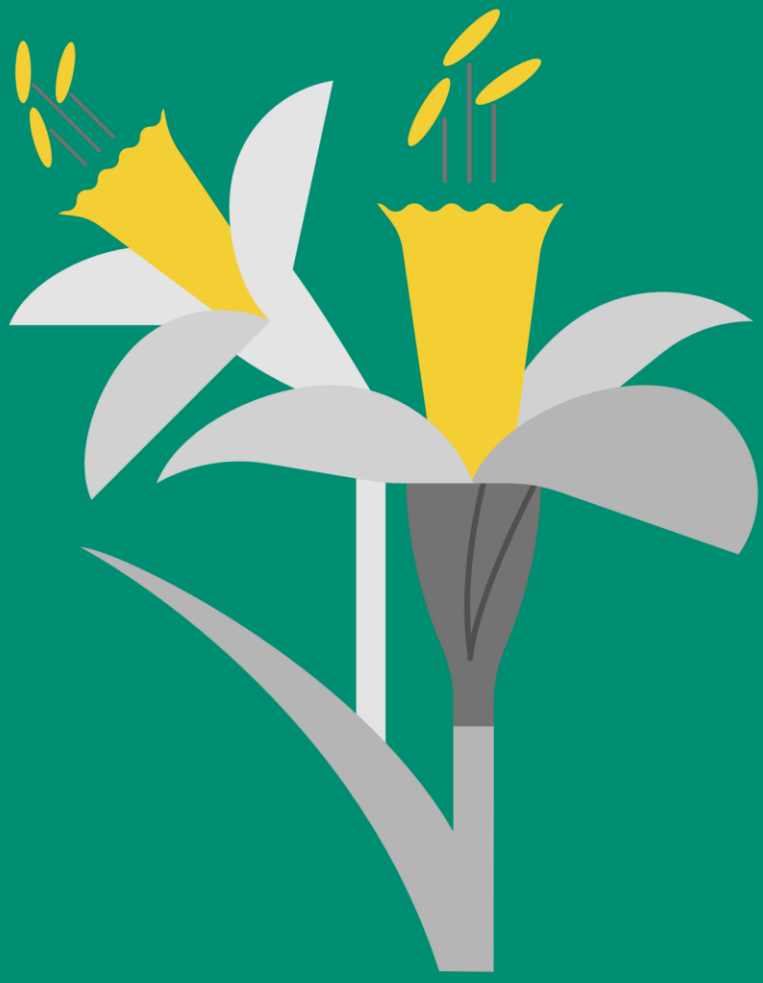
Tool/Approach	Who is it for?	How hard is it?	How?			Why?		
			A	B	C	D	E	F
Appreciative Inquiry	Most people Options 1 and 2	More advanced Harder but worth it	X	X		X	X	
Appreciative Questions	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X		X	X	
Body maps	Most people Options 1 and 2	Easy Peasy Start straight away	X	X			X	
Capturing casual moments	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X	X			X
Case Studies	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep		X	X	X	X	
Choosing pictures	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X		X	X	
Community of Enquiry	Most people Options 1 and 2	Not too bad Takes a bit of prep	X	X		X		
Creative writing	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X		X		
Diaries	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X	X	X	X	
Emotional touchpoints	Most people Options 1 and 2	Not too bad Takes a bit of prep	X	X		X	X	
Fishbowl	Everyone Options 1, 2 and 3	More advanced Harder but worth it		X	X		X	
Focus Groups	Most People Options 1 and 2	Not too bad Takes a bit of prep		X	X	X	X	

The Full List

All of them in one place

Tool/Approach	Who is it for?	How hard is it?	How?			Why?		
			A	B	C	D	E	F
Key informant interviews	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep	X	X		X	X	
Most Significant Change	Most people Options 1 and 2	More advanced Harder but worth it	X	X		X	X	
Observations	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X	X			X
Open Space Technology	Some people Just option 1	More advanced Harder but worth it	X			X		
Positive Deviance	Everyone Options 1, 2 and 3	Not too bad Takes a bit of prep		X	X	X	X	
Primary data	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X	X	X	X	X
Reflection	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X	X	X	X	X
Relationship Map	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X	X	X	X	
Social Media Analysis	Most People Options 1 and 2	Easy Peasy Start straight away	X	X	X	X	X	X
Sticky wall	Everyone Options 1, 2 and 3	Easy Peasy Start straight away		X	X		X	X
Stretch Statements	Everyone Options 1, 2 and 3	Easy Peasy Start straight away		X	X	X	X	
Surveys	Most People Options 1 and 2	Not too bad Takes a bit of prep	X	X	X	X	X	X
Tactile feedback	Everyone Options 1, 2 and 3	Easy Peasy Start straight away	X	X		X	X	

Useful Bits and Pieces



Useful bits and pieces

Four Top Tips for Facilitators

Whilst this guide does its best to be self-explanatory, groups may appreciate some extra support to get the best out of their evaluation deliberations.

If you will be using *Proving and Improving* to facilitate a group workshop or discussion, the following top tips should help you on the way:

1

Keep it simple!
The step-by-step process set out in this guide already provides a natural workshop structure. Simply taking a group through each step, one at a time, and encouraging careful thought and reflection along the way should make for a rich and rewarding discussion.

2

Rules are there to be broken
Whilst most groups will likely follow each step in the order intended, if some would rather do it in reverse – that's fine. If they'd rather skip a step – that's fine. If they'd rather just jump straight to the methods – that's fine too. The purpose of this guide is to assist, not hinder groups, and so it should be used pragmatically, and with flexibility. All that matters is that any group feels empowered to make considered choices around evaluation, which are in their best interests, and the best interests of the people they work with and support.

3

Print things out
Having physical stuff to move around can make the thinking much easier. The cards sets (starting on Page 13) can be printed out on A4 paper, then cut out. The evaluation canvas (on Page 12) can be printed out on A3 paper, or two bits of A4. If you do this, each card will fit perfectly onto the canvas. Printing out a selection of methods (starting on Page 35) may really help too! Make sure you have big pieces of paper, felt pens and sticky notes with you as well, for jotting down ideas and capturing the groupd thoughts and suggestions as you go along. If supporting groups remotely, use pages of this guide as slides.

4

Get connected
Proving and Improving isn't just a guide, it's also a supportive community of practice, where groups across the country can come together to ask questions, share ideas, and support each other to learn and grow. Make sure your group know how to get involved, and continue receiving support on their evaluation journey. Go to the dedicated *Proving and Improving* space at https://egin.community/to find out more.

Useful bits and pieces

The Proving and Improving Community (and more)!

Visit the dedicated 'Proving & Improving' space in the Egin Online Community (https://egin.community/) to connect with people using this guide across Wales and around the world. Ask questions, share ideas, and keep up to date with the latest news and events, as part of the growing Proving and Improving Community.

The following organisations, referenced frequently within this guide, are also a great starting point for those looking to build a wider and deeper understanding of evaluation, public engagement and co-production in their work.

BetterEvaluation: BetterEvaluation is part of the Global Evaluation Initiative, a global network of organizations and experts supporting country governments to strengthen monitoring, evaluation, and the use of evidence in their countries.
www.betterevaluation.org

The Co-production Network for Wales: The Co-production Network for Wales brings together a community of people who believe in the value of co-production. They provide an extensive free-to-access knowledge base, including a range of resources dedication to 'co-evaluation'.
www.copronet.wales

Evaluation Support Scotland: Evaluation Support Scotland are a Charity dedicated working with third sector organisations, as well as trustees, intermediaries and funders, to ensure that they can measure and explain their impact and learn how to improve practice and inform policy.
www.evaluationsupportscotland.org.uk

Involve: Involve is the UK's leading public participation charity. Through their website, they provide wide ranging resources, including over 60 free method guides, introducing tools and techniques which can be utilised to enable public participation in projects of all shapes and sizes.
www.involve.org.uk

In addition to these, the '**National Principle's for Public Engagement**' are an important guide for any organisation working with people and communities in Wales, and can be found on the WCVA website. https://wcva.cymru/influencing/engagement/

The guide was developed with Co-production Lab Wales, through an extended co-design exercise with the Egin team, their friends and their partners.

EGIN

Asedau Segur
Camau Cynaliadwy Cymru

Dormant Assets
Sustainable Steps Wales

Ddarperir gan
CRONFA GYMUNEDOL
LOTERI GENEDLAETHOL

Delivered by
THE NATIONAL LOTTERY
COMMUNITY FUND