Renewal & Reform

Evaluation Guidance
Learning from Strategic Development Funding

Introduction

1. Strategic Development Funding provides rich opportunities for learning. That learning has the potential to benefit the diocese in receipt of the funding and those in the wider Church who may already be engaged in, or planning, a similar project. The learning will also help to inform future national Church funding decisions. For these reasons, it is important to make sure that the learning from the funding is gathered and disseminated effectively.

2. Effective evaluation needs to be proportionate and useful. It is not an academic exercise – the aim is to capture learning in a way which provides practical lessons for those looking to undertake similar activity.

3. Projects will be asked to undertake monitoring and evaluation in order to keep track of progress (in terms of activity, timescales and budgets) and to ensure that learning is captured effectively, reflected upon as the project goes along and changes made to the project as necessary in the light of the learning.

What are dioceses asked to do?

4. Dioceses are asked to ensure that the main areas of learning from their project are captured through monitoring and evaluation and to ensure that there are sufficient resources available (money, people and time) to achieve this.

5. Specifically, dioceses are asked to:

- Include proposals for the evaluation of their project as part of the second stage application process for Strategic Development Funding;
- Monitor and evaluate the progress of - and learning from - the project and prepare an annual evaluation report (due on the anniversary of the grant award) detailing that progress and learning;
- Where funding is provided for more than four years, participate in a mid-term project review to ensure the project is on track to deliver the outcomes proposed in the project plan (together with any agreed changes to the proposal agreed following the award of funding);
- Commission an independent evaluation of the project towards the end of the funding period.

Evaluation Planning and Reporting

6. The language of evaluation - and the vast number of different opinions and methodologies on the best ways of undertaking it - can make the subject seem confusing and opaque. We strongly recommend that - both at project and diocesan level - dioceses aim to make the process of learning from their projects through monitoring and evaluation as simple as possible.

7. To keep the format of the evaluation plan straightforward, we suggest a simple structure:

- the project's **aims** – i.e. the **changes** which the project intends to achieve.
- the project's **objectives** – i.e. the **activities** which the project plans to carry out to achieve its aims.
- What the anticipated **outputs** will be over time. Outputs are the products, services or facilities provided by the project to its users.

- The project's **outcomes**. Outcomes are all the changes and effects that **actually** take place as a result of a project's work, expected or unexpected, welcome or unwelcome.

8. We suggest that **learning** is then captured simply, in terms of:

- What went as planned?
- What did not go as planned and why?
- Any changes made to the project during its life, in the light of experience, and why
- Learning: what advice would you give to someone undertaking a similar exercise again?

9. Dioceses will be asked to produce an annual monitoring and evaluation report (beginning from the first anniversary of the first payment) as a condition of funding. We ask that you keep the format simple, following the structure in paragraphs 7 and 8 above. A simplified list is included at Appendix A.

10. As a general rule of thumb, we suggest that you aim to produce a report of no more than ten pages, focusing on key data, progress and learning. We are not looking for a wealth of detail.

11. In terms of learning, we suggest you highlight one or two really key lessons. These may include aspects of project management, especially to start with, when it may be too early realistically to expect outcomes and when the project is most likely to encounter teething troubles.

12. We ask that you attach to your report a summary of project spend to date compared to budget and the latest cash flow forecast.

13. The Strategy and Development Unit will be in touch around every 6 months to catch up on the project's progress. The Unit will also meet with you annually, usually after you have sent us your evaluation report, to discuss progress and the emerging learning in more detail.

14. In addition to the formal monitoring and evaluation reports and meetings, we encourage you to keep us in touch on a regular basis by email with very short progress updates.

Measuring the progress of the project

15. You will need to identify at the outset what measures will help you to assess progress against the project's aims and objectives. The obvious starting point will be the overall objectives set out in the application. These aims and objectives may not be directly measurable, so you will have to think carefully about what measures will provide an indication of progress. Further reflection is always helpful at the point of implementation to work out the practicalities. The measures must be 'owned' by all involved in managing and delivering the project. Users should be able to act on them for review and improvement.

16. In order to evaluate you will need to collect data during the course of the project. Make sure that you have the right balance for your project and for the team who are overseeing it in order to avoid the risk of monitoring becoming a burden or an end in itself.

17. It is important at the beginning of a project to establish **baseline figures** at an early point, if you are not relying on existing measurement systems.

18. **Output measures** – these are usually quantitative and help to assess progress against objectives as part of monitoring. They will include the activities being undertaken at project level (eg the number of courses run, people trained, etc).

19. **Outcome measures** – these can be quantitative or qualitative and help to show progress against aims. The choice of outcome measures at the outset is **really important**: think carefully about what would best substantiate whether or not the project was working. It is generally better to use a small number of well-chosen measures, taking care to address the risk of the project outcomes being influenced by the choice of data being collected, for example, balancing quantity and quality, short-term vs long-term, and so on. Make sure that qualitative measures really are focused on quality, i.e. that they capture whether or not the project is doing something well.

20. Quantitative information might be gathered from, for example,

- numbers attending worship
- numbers joining discipleship groups
- numbers involved in volunteering / leadership roles
- giving figures
- numbers being baptised / confirmed

21. In doing this it will be helpful to identify both lead and lag measures:

- **Lag Measures** The measurement of a result you are trying to achieve. They are so called because by the time you get the data the result has already happened; they are always lagging. An example would be growing financial strength or an increase in attendance (most of the list above are lag measures)
- **Lead Measures** These foretell the result. They have two important characteristics – they are predictive (i.e. if you do something with this then the lag measure will be affected) and influenceable (it can be influenced by those involved in the project or activity).They should also drive the right behaviours. These might include key activities undertaken on the ground – ie the number of explorers' groups arranged, or the number of invitations from members of the congregation.

22. Lead measures are not always obvious and there are often a number that could be chosen, so it is important to take time and think it through. Lead measures can be powerful tools to influence behaviour, both positively and negatively. It is important to think through how to create measurement practice which inspires change. The adage "what gets measured gets done" is a helpful reminder of both the benefits of effective measurement, and the risks of choosing poor measures.

23. We are very happy to discuss the choice of measures with you if you would find that helpful.

24. Qualitative **and** quantitative information can also be collected by other methods, for example, interviews, focus groups, questionnaires, diaries and case studies. Asking for information on some form of scale (eg 1 to 5) can be a useful way of collecting intensity of response, and also helping those completing the questionnaire understand what you are looking for. As before, keeping questions simple and unambiguous is usually better than trying to be overly sophisticated.

25. As part of the evaluation progress, we will ask you to provide some of the key output, lead and lag measures which most clearly indicate the progress of your project. You may choose to collect more information which helps you with delivery, but is not directly useful for

evaluation purposes. It is also important to make sure your projects engage with the wider Church of England statistics collection (e.g. Statistics for Mission).

Commission an Independent Evaluation

26. Dioceses will be asked to commission an independent evaluation of the project towards the end of the funding period. They are also required to include an element of independent evaluation throughout the project.

27. The Archbishops' Council and Commissioners' key requirement from the evaluation is simply to examine what the project has achieved against what was expected and to ensure that key learning is captured to inform the diocese's future planning and work and that of the wider Church. To that end, the evaluation should cover the same broad areas as the annual monitoring reports and set out at paragraphs 7 and 8 above.

Dissemination

28. Dioceses should set out how they plan to promulgate the learning within the diocese and to the wider Church. It is often helpful to think about the different audiences: potential practitioners will need both practical detail and practitioner-to-practitioner learning (eg seminars, visits or workshops); senior clergy may also be interested in more detailed material but summaries and presentations may help to influence. The final form of dissemination may depend on what has been learned. The national Church will help to share the learning from the Strategic Development Funding with the wider Church via toolkits, seminars, Peer Review and other routes.

29. The learning will also help inform future national funding decisions, and will be shared with members of the Archbishops' Council and Church Commissioners as part of the arrangements to provide accountability for the use of national Church funding.

Funding

30. The cost of undertaking evaluation and dissemination should be reflected in the overall budget for the proposal.

Other Resources

31. Websites with useful resources on monitoring and evaluation include:

https://www.ncvo.org.uk/practical-support/outcomes-and-impact

www.thinknpc.org/our-work/our-services/measuring-impact-2/

http://www.evaluationsupportscotland.org.uk/evaluation/

Any questions

32. If you have any questions on any aspect of this guidance, please get in touch with David Jennings at david.jennings@churchofengland.org or Catherine Dorman at catherine.dorman@churchofengland.org.

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Appendix A

Guidance on the Report headings

- ***Project Aims and Objectives*** Look at the original application: what were the original aims and objectives?
- ***Outputs: how are you doing this?*** Please give a brief description of your activity on a day to day basis. Outputs are basically the numbers for whatever the main work of your project is – e.g. how many bible study groups have been run, how many hours of training have been undertaken, training courses run, how many people attended, and so on.
- ***Outcomes: what have you achieved to date? What went as planned and what did not?*** This is the main report against the growth and other criteria, for example, has attendance grown or is there tangible evidence of improving discipleship (rising giving, people coming forward for leadership, etc)?
- As well as quantitative data, it will be helpful to provide a brief narrative – for example, why the figures may be higher or lower than anticipated.
- ***The progress of the project in financial terms***: how is spending comparing with the original budget? Are certain areas proving more or less expensive to undertake than anticipated? Is the project moving towards financial sustainability? (This will also help us manage the funds for the overall programme.)
- ***What changes have you made and what will you do in the future?*** Knowing why you changed something, or what you might do differently next time can provide us with insights that can be shared more widely, and will help us evaluate different projects with similar approaches.
- ***What advice would you give to a similar project?*** Analyse your main achievements, disappointments and areas of learning. Knowing what works can help reduce the likelihood of others reinventing the wheel; knowing what has not worked can help prevent others repeating it. Knowing how you overcame a problem can be particularly valuable to others following the same path. Equally, if it is too early to make a sensible judgement, please say so.
- ***Finance*** Please attach a summary of project spend to date compared to budget and the latest cash flow forecast.