

1 INTRODUCTION

This document provides some generic guidance for projects' self-evaluation work. It is in three Sections:

1. **Case Study template.** We have asked all projects to produce case studies - this Section provides some guidance on the main elements to cover in doing so;
2. **Guidance on measuring other indicators.** There may be some indicators in your project plan where we have not provided a specific tool to use and your existing evaluation systems won't provide the information you need. This Section provides guidance in this situation; and,
3. **Example beneficiary form.** We have asked most projects to break down information about their beneficiaries (typically by age, gender, ethnicity and disability). This Section provides some guidance on this.

Again, GHK are providing ongoing support to projects to help them evaluate their own work: please contact us if you require further guidance.

2 CASE STUDY TEMPLATE

2.1 Introduction and Guidance

This template is to offer guidance where GHK have specified the production of case studies as part of projects' self-evaluation requirements. It is not supposed to be prescriptive and people responsible for producing case studies may wish to alter it to suit their circumstances.

On a related point: there are 'case studies' and 'case studies'! In most instances, we have asked for short case studies (of a few paragraphs in length) of individuals, showing the effects that a project has had on a person's life. However, for some projects we have recommended case studies of organisations – employers for example – or events, such as conferences.

The point to note here is that same essential elements apply, but the range and type of evidence drawn on will differ: for individuals it may be case notes or an in-depth interview; for organisations it may be a range of interviews or focus groups, data relating to the organisation or a review of key documents.

One key issue to consider when producing a case study (and indeed in most types of research) is confidentiality. You should be clear to people about the basis on which information they give you will be used. As a general rule, you should completely anonymise them: change names and remove any details that might identify them as the subject of the case study. Case studies of organisations or events are slightly different, but again it is generally better to anonymise wherever the subject matter may be sensitive.

Finally, GHK are offering ongoing support to projects in self-evaluation, please get in touch with us should you require any advice in putting together case studies.

2.2 Typical Elements of a Case Study

Generally case studies have a brief introduction and then tell the story in chronological order; the main elements are:

Introduction

A brief explanation of what the case study is of (e.g. an individual beneficiary receiving a service, an employer, an event?) and why this particular case has been chosen. This final point is important. The subject of your case studies can be selected for a number of reasons: was there a particularly strong effect in this case? Was this a 'typical' case for your project? Was this an occasion where your project didn't have the desired effect? You should also say what this case study is based upon, e.g. an in-depth interview with a beneficiary, or a range of sources gathered over a period of time.

The Situation before your Intervention

This should be a description of the situation this person / organisation was in when you became involved. You should consider the most important factors and circumstances that led to your intervention, e.g. did this organisation have very high staff turnover and

low morale? Essentially, this is the part of the story where you are saying why there needed to be a change in the situation.

The Intervention

Simply describe what you did with this person / organisation and why. The level of detail will be up to you, but again you should try and pick out the most pertinent elements of your work.

The Effects of your Intervention

What changed in this person's life, or the organisation you worked with as a result of your intervention? It is often helpful to refer back to the situation before you became involved: have all of these problems been solved / managed? What were you able, or not able to change? What is the situation now?

Future Plans and Points of Learning

Having done your work (and perhaps completed your involvement) what are the next steps for this person / organisation? Have they gone on to access other services / opportunities? Have they made any future plans? Will you be involved at a later date?

This final element of the case study is also a great place to reflect on what it was about your involvement that led to the changes (or perhaps lack of changes) you've described: what specific lessons are there for your organisation or others who might be attempting similar work in future?

3 MEASURING INDICATORS NOT COVERED BY GHK OR PROJECT TOOLS

There are some outcome indicators in your project plan for which we have not supplied a specific tool. Most often, these indicators will be for immediate outcomes – changes in people’s knowledge or awareness – and, in many cases, projects’ existing evaluation tools will be able to supply this information.

However, if this is not the case for your project, then the method below provides a useful means of measuring these outcomes:

- Turn the indicator into a statement. The wording of the statement will depend upon whether you are administering the question as a ‘before and after’ measure, or simply as part of feedback at the end of the project/intervention:
 - If you are administering the tool at the end of the project then please start your statement with *“As a result of this project...”* It may be useful to insert your project’s name / a name recognisable to the beneficiary.
 - If you are administering the tool as part of a ‘before and after’ measurement (and this will be the most accurate measure), then still use the indicator as the basis for a statement, but do not refer to your project.
- Ask people completing the questionnaire to respond on a 5-point scale: Strongly Disagree, Disagree, Neither Disagree or Agree, Agree, Strongly Agree. (‘Smiley face’ scales are also commonly used).

So, for example, if you were looking to measure the indicator ‘No. of beneficiaries who increase their enjoyment of exercise’, you would either have a statement such as *“As a result of [project name], I have an increased enjoyment of exercise”* - if administering at the end of the project – or, *“I enjoy exercise”*, if administering ‘before and after’.

Again, scoring will vary depending upon whether it is a ‘before and after’ measure or not:

- For before and after measures, you should give the number of people who improve on their baseline position. So, if 50 people complete the ‘before’ measure (the baseline) and when they are re-tested 30 show an improvement, then 30 is your answer.
- If you are taking the measurement at the end of the project only, then you should give the number of people who agree with the statement, e.g. if 30 people either ‘Strongly Agree’ or ‘Agree’ with the statement *“As a result of [project name], I have an increased enjoyment of exercise”*, then 30 is your answer.

GHK will be happy to take a look at any scales or measures you produce.

4 EXAMPLE BENEFICIARY MONITORING FORM

For most projects we have asked for beneficiary information to be collected by people's age, gender, ethnicity and disability. This form shows the type of information you may want to collect to help you fulfil these requirements.

The details each project will want to collect will vary enormously (e.g. some will be collecting short medical histories or GP information; others will not require this level of personal information); this form is therefore provided as an example to guide you and to incorporate the information into your existing monitoring arrangements, rather than as a standard form for all projects to use.

Name:

Address:

Postcode:

Email address:

Telephone Number:

Are you:

- Male / Female

Which age group are you in? ¹

Under 16	16-24	25-34	35-44	45-54	55-64	65-74	75-84	85+
-------------	-------	-------	-------	-------	-------	-------	-------	-----

What is your ethnic group?

- White British
- White Irish
- Any other White background (please state): _____

- Mixed: White and Black Caribbean
- Mixed: White and Black African
- Mixed: White and Asian
- Any other Mixed background (please state): _____

¹ Asking for date of birth may be more useful, especially if working with people over a longer period of time.

- Asian or Asian British: Indian
- Asian or Asian British: Pakistani
- Asian or Asian British: Bangladeshi
- Any other Asian background (please state): _____

- Black or Black British: Caribbean
- Black or Black British: African
- Other Black background (please state): _____

- Chinese
- Other Ethnic group (please state): _____

- Refused to give

Do you have any long-term illness, health problem or disability which limits your daily activities or the work you do? (include problems due to old age)

- Yes / No

Thank-you for completing this form. We may want to contact you at a later date to help us evaluate our project; are you happy to be contacted for this purpose?

- Yes / No