COMMUNITY DEVELOPMENT EVALUATION RESEARCH

1) Literature Review of Evaluation Methods & Methodologies

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community Waitakere

Community Waitakere has a vision for a sustainable Waitakere with thriving, connected communities.

Community Waitakere is a community development organisation committed to achieving strong, dynamic, sustainable community and voluntary sectors in Waitakere. **Community Waitakere** strengthens the links between community groups, organisations, businesses, government and individuals by promoting and modeling collaboration and partnering, enhancing networking and communication, developing projects and helping to foster collective visions of positive change in Waitakere.

Community Waitakere commissioned **innovate change** to conduct a research project on community development evaluation methods and methodologies. The research and writing of these case studies was a part of that project.

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EXECUTIVE SUMMARY

Community Waitakere commissioned this literature review as a part of a larger research project to improve its understanding of community development evaluation methods and methodologies.

There are many organisations working with communities in Aotearoa New Zealand. It is important we develop our understanding of the impact organisations and the programmes and services they run have on the positive development and well-being of our communities. This review of some of the literature relevant to community development evaluation looks at eight specific evaluation methods and methodologies, as well as providing examples of a range of other practical tools and evaluation exercises.

The literature search which informed this review focused on the needs of small community development organisations, interested in developing their own evaluation frameworks. It is not intended as a comprehensive overview of 'all things' evaluation in the community development space.

The research that informed this literature review did not include a specific exercise to select methodologies. What is included in this review is based on the author's opinion and discussions with Community Waitakere on the most useful approaches for community development programmes and organisations in New Zealand.

In line with its commitment to collaboration and shared learning, Community Waitakere will share this resource with other community development organisations and practitioners. It is intended that this review and its wide availability will encourage more evaluation of community development work in Aotearoa New Zealand, and encourage debate about how best we do evaluate community development work.

INTRODUCTION

The word 'evaluation' has become increasingly used in the language of community, health and social services and programmes. The growth of talk and practice of evaluation in these fields has often been promoted and encouraged by funders and commissioners of services and programmes. Following the interest of funders, has been a growth in the study and practice of evaluation by community, health and social service practitioners and academics.

When we consider why this move in evaluative thinking and practice has occurred, we can assume the position of the funder and simply answer, '…because we want to know if this programme or service works'. Practitioners, specialists and academics in these fields have been called upon by governments and philanthropists to aid the development of effective evaluation. Over time, they have led their own thinking and practice independently.

Evaluation in its simplest form is about understanding the effect and impact of a programme, service, or indeed a whole organisation. Evaluation as a practice is not so simple however, largely because in order to assess impact, we need to be very clear at the beginning what effect or difference we are trying to achieve.

Let us take a youth service that runs a range of outdoor adventure based youth programmes with young people as an example. The programmes broadly focus on improving outdoor skills, self-esteem and personal skills. Now let's take some target areas that are common with government policy related to young people, like those related to young people being in school, employment and training; having good access to appropriate health care (leading to reduced rates of sexually transmitted infections and skin conditions). If we used indicators related to these targets to evaluate the youth service, it is quite possible that it will show low to no impact. Now, that does not mean the programmes are ineffective – it means the evaluation methods were not appropriate. Conversely, if we assessed the youth service against indicators related to skills and knowledge of the outdoors, levels of self-esteem and personal skills levels (using research that has developed such indicators as our guide), we should get a more accurate picture of programme effectiveness.

Community development is a broad field that overlaps with other professions and disciplines, including social development, public health, social policy, advocacy, social activism, social democracy, community psychology, human geography, social anthropology, health promotion, youth development, social work, and other areas of practice. In this way the research and practice that community development draws from is, appropriately, broad. Core principles of building communities based on respect, justice, inclusion, equality, non-discrimination, and participation, remain at the heart of community development practice. Community development believes each and every community has rich skills and knowledge and that these are the most valuable assets for communities to realise their aspirations. Practitioners work to facilitate ways for these rich skills, experiences and knowledge to come together and work in ways that create positive community and social change. (ref: SCCD, 2001). Drawing from diverse literatures should ensure alignment on these core principles.

Evaluation offers community development important insight into the impact our programmes and services have on these high level principles and more specific outcomes and goals. Evaluation allows

us to see through the lens of the people we are working with and for. Evaluation is therefore, a critical part of effective and ethical community and social engagement and practice.

Effective community development practice should have an inherent interest in what effect the work is having on community well-being, growth and development. Practitioners should pose questions like:

- How does this programme increase inclusion and participation of people in their communities?
- What impact does this programme have on positive social connection between community members?
- What effect does our organisation have on community members' well-being?
- What impact does our work have on reducing inequality and social exclusion in this community?

Navigating this Literature Review

The literature review begins with an overview of qualitative and quantitative research methods, followed by a description of key forms of evaluation. Health promotion evaluation and advocacy and policy evaluation will then be explored as two specific domains. These domains are not evaluation methodologies, but forms of evaluation that present unique requirements for effective community development evaluation. Following this discussion, the review will explore eight key evaluation methodologies: appreciative enquiry, empowerment evaluation, social capital, social return on investment, outcomes based evaluation, performance dashboards and scorecards and developmental evaluation. Each of these sections will include specific methods, the values base of each methodology, the resources required, and examples of the methodologies in action. A summary table in appendix A summarises the methodologies, as well as each section ending with a summary. Finally, a range of innovative, practical evaluation tools that could be valuable for community development practitioners will be summarised.

Glossary

While effort has been made to keep the use of jargon to a minimum, there will be occurrences where language specific to evaluation will be used. The table below clarifies what is meant (in this document) by particular, commonly used terms like methods, methodologies, and tools.

Methodologies	A methodology is a system of evaluation that is informed by particular philosophies and theories. Methodologies will include a range of methods and tools.
Methods	Methods are the more specific and practical ways of implementing a methodology. Methods may use a range of tools.
Tools	Tools are very practical and specific exercises that can be used to complete evaluation.
Outcomes	In terms of evaluation, an outcome is the end state of the community (or community members) as a result of a programme, activity or service – e.g. Community members feel a strong sense of connection to their

	neighbourhood.
Indicators	Indicators are measures of success.
Activities	These are the pieces of work a larger programme or service could be broken down into – e.g. writing policy submissions or facilitating community meetings could be activities that are a part of a community regeneration programme.

LITERATURE REVIEW

Research Methods and Types of Evaluation

This literature review will focus on methodologies and models of evaluation. Comprehensive evaluation frameworks are likely to involve a range of evaluation activities to assess different aspects of a programme or organisation. Different types of evaluation will answer different questions, and use different types of data to answer those questions. For example, an organisation may develop a comprehensive outcomes plan that aligns its projects and activities with particular objectives and outcomes, which lead to the achievement of its core goals and aim. There will be different indicators chosen that will track progress for certain outcomes and/or objectives. However, there may still be a requirement or desire to examine in detail the impact or effect of a specific project or activity or set of activities. These evaluation exercises may be specific one-off projects.

There are two major groups of methods that will be used in such exercises, qualitative and quantitative methods. Quantitative methods gather data that is countable and measurable. Common forms of data that is analysed in quantitative evaluation includes survey data, service usage data, control groups (where one group receives a particular service, and the other does not), published statistics and demographic data. Qualitative methods of inquiry has a genesis in the social sciences, but is widely used across a range of disciplines. These methods seek to understand human behaviour and the reasons people do what they do, and why they make the decisions they do. Common forms of qualitative data that are collected and analysed include interviews, focus groups, observations of practice or work, and case studies (Trotman, 2008; Scriven 2001; Davidson, 2005). Many research projects will use both qualitative and quantitative lines of enquiry, these projects are known as mixed methods. In this way qualitative data can help unpack and strengthen quantitative hypothesis and results (and vice versa).

In terms of evaluation, there are three types of evaluation that are useful to understand. All can use both qualitative and quantitative data.

Formative Evaluation

Formative evaluation is often undertaken at the development stage of a programme or service. This may happen at the beginning of a programme design process or at review stages of a programme. Formative evaluation complements (and perhaps overlaps) with some of the outcome planning models described earlier and seeks to understand:

- what resources are available
- what needs the community or people being served have
- what is already known about the community
- whether the programme or service design been well thought through (for example, are the assumptions and links made between aims, outcomes, objectives and activities 'right', have indicators been identified?)
- who needs to be involved. (Barnes, 2009; Dehar et al, 1993).

Needs assessments often form a part of a formative evaluation process. Formative evaluations are usually for internal use, to inform programme design and review. (Davidson, 2005; Barnes, 2009).

Process Evaluation

Process evaluation tracks how a programme or service is doing, and may be conducted at key points along the lifecycle of a service, programme or organisation. It will document what actually happens in practice. Data and analysis can be used in similar ways to formative evaluation – for programme design and review. It can also be used to communicate with external stakeholders to understand the 'behind the scenes' working of the programme. (Barnes, 2009; Adams et al, 2009; Dehar et al, 1993).

Outcome, Impact and Summative Evaluation

Outcome, impact and summative evaluation seeks to tell the story of the programme's or organisation's efficacy – essentially, has the programme done what it was designed to do. Outcome evaluations (also called summative evaluations) tend to be more long term looking than impact evaluations. An outcome evaluation may be done at a critical or end point of a programme to assess its long term effects on the intended goals and outcomes. An impact evaluation may be more interested in short and medium term programme effects. (Barnes, 2009; Adam et al, 2009; Duignan, 2009).

Domain Specific Evaluation

Health Promotion and Public Health Evaluation

Public health is a related discipline to community development. Health promotion is a sub-discipline of public health. Public health is interested in improving the health of population groups, and takes a broad view of health as its definition, not just the absence of disease or illness. Definition of a healthy population could well include outcomes such as populations feeling a strong 'sense of community' or reporting strong connections to their communities, as well as community organisations working collaboratively together in effective ways to improve a community's health and well-being.

Understood this way, the alignment with community development is particularly clear. Community development practice is seen as a core component of effective health promotion programming. For instance, creating supportive environments and strengthening community action are two of five core action strategies of the *Ottawa Charter for Health Promotion* (World Health Organisation, 1986). Like community development, there are myriad methods of evaluating health promotion programmes (Dehar at al, 1993; McKenzie et al, 2007; Waa et al, 1998).

A strong local example is Adams and colleagues' (2009) project that examined a Waitakere programme, the Rānui Action Project, a community development project focused on addressing the social determinants of health inequalities in Rānui. The evaluation sought to assess the effectiveness of the project in improving "the health and wellbeing of children and families via the critical pathways of strengthened communities and enhanced social capital" (p. 145). This evaluation goal, so clearly aligned to aspects of community development, highlights how health promotion evaluation may provide excellent value for aspects of community development evaluation.

Adams et al (2009) evaluate the project using a combination of formative, process and impact evaluation models. All of these approaches could adapt well to community development projects. The formative evaluation stage involved an evaluator working as "…a critical friend and mentor walking alongside the project workers" (p. 146). The evaluator completed a needs assessment and a

community profile, and facilitated project planning and the development of monitoring mechanisms with staff. The process evaluation stage included the evaluator observing meetings and events, completing a desk review of key documents and assessing media coverage of the project. It also included key informant interviews with staff and stakeholders. The impact and outcome evaluation stage also used qualitative interviews with staff and stakeholders as well as quantitative surveys of community residents. (Adam et al, 2009). This framework provides a useful model for those wishing to utilise a similar approach in community development evaluation.

Evaluating Advocacy and Policy Work

Advocacy is a common area of action for community development organisations. The literature around evaluating advocacy and policy type interventions is important to consider because it clearly differentiates the difference between advocacy work compared to direct programme or service delivery. The evaluation methodologies that will be discussed later will often be most suited to evaluation of services or programmes working directly with communities, individuals or groups of people.

Advocacy strategies evolve and change over time, activities and desired outcomes can shift, and external forces and conditions can impact significantly. Advocacy and social change organisations are often small in terms of their size and capacity to manage evaluations. It is in these ways that the work differs significantly from direct service or programme delivery. (Harvard Family Research Project 2007; Nemec, 2011). Because of these differences, evaluation methodologies used may also need to be different.

Nemec (2011) suggests that evaluations of advocacy work needs to take care to 'provide realtime feedback' and give interim outcomes the respect they deserve. This acknowledges that advocacy strategy often needs to, and does, change quickly due to the changing political environment, thus requiring on-going feedback, that is not limited to a project's conclusion. It also privileges outcomes that are not limited to significant policy or legislative programme change as a result of the advocacy, to include more incremental change such as community groups' co-ordinating response to issues and building associated partnerships, or getting media or other editorial attention on the issues.

Coffman (2011) provides insight into the learnings for evaluating advocacy work in her reflection on the movement for political change that resulted in the 2011 protests in Egypt. She provides a useful collection of examples of interim advocacy outcomes which is reproduced below (also reproduced in Nemec, 2011).

Advocacy Outcome	Description of Outcome
Partnerships or Alliances	Mutually-beneficial relationships with other organizations or individuals who support or participate in an advocacy strategy.
Organizational Capacity	The ability of an organization or coalition to lead, adapt, manage, and technically implement an advocacy strategy.

Advocacy Outcome	Description of Outcome
Collaboration and Alignment	Individuals or groups coordinating their work and acting together.
New Advocates	Previously unengaged individuals who take action in support of an issue or position.
New Champions	High-profile individuals who adopt an issue and publicly advocate for it.
Constituency or Support Base Growth	Increase in the number of individuals who can be counted on for sustained advocacy or action on an issue.
New Donors	New public or private funders or individuals who contribute funds or other resources for a cause.
Organizational Visibility or Recognition	Identification of an organization or campaign as a credible source on an issue.
Media Coverage	Quantity and/or quality of coverage generated in print, broadcast, or electronic media.
Issue Reframing	Changes in how an issue is presented, discussed, or perceived.
Awareness	Audience recognition that a problem exists or familiarity with a policy proposal.
Attitudes or Beliefs	Target audiences' feelings or affect about an issue or policy proposal.
Salience	The importance a target audience assigns an issue or policy proposal.
Public Will	Willingness of a target audience (non-policymakers) to act in support of an issue or policy proposal.
Political Will	Willingness of policymakers to act in support of an issue or policy proposal.

The US based Annie E Casey Foundation comprehensive guide to advocacy and policy evaluation provides a framework for developing evaluation of advocacy work (Reisman et al, 2007). The suggested starting point is to clearly identify a theory of change. Developing a theory of change is essentially about designing the system of interventions, strategies and outcomes that the programme includes to feed into a higher level goal (for example, Waitakere has stronger and more connected communities). The second step of the framework is to identify outcome categories. The guide has reviewed a wide range of advocacy programmes, and identifies that there are many similarities across programmes regarding outcome categories. The guide provides a range of category examples, which

have linked outcomes and activities identified under each of the categories. The table below provides some examples:

Categories	Outcomes	Activities
Strengthened alliances	Increased number of partners supporting an issue	Building alliances among unlikely allies
Strengthened organisational capacity	Improved strategic abilities of organisations involved with advocacy and policy work	Communication skill building
Change in policies	Policy adoption	Educational briefings of legislators

(Reisman et al, 2007, p. 17).

The final step in the framework is to select a practical and strategic approach to measurement. Key considerations in this stage centre around what kind of data will be collected, what questions specific data will seek to answer, and how data will be collected and analysed. Resiman et al (2007) suggest a range of data measures should be chosen that seek to:

Identify and measure core outcome areas related to social or policy change

- evaluate strategic progress
- identify and measure short-term incremental objectives
- assess the capacity of the advocacy/policy organisation
- include case study documentation of process and impacts. (p. 23-26).

This model of evaluation has significant similarities to programme logic modelling and outcomes based planning, discussed later.

Appreciative Inquiry

Appreciative inquiry is an approach that when used for evaluative purposes focuses on the current capacity and strengths of an organisation, community or programme. An appreciative inquiry approach proposes that whatever you want more of in a programme, service or whole organisation, already exists. Appreciative inquiry can be compared to the strengths-based approach used in social programming. In social work for example, strengths-based practice would have at its starting point the client's positive strengths, as opposed to problems or challenges for the client. In many ways appreciative enquiry would start in a similar way. Instead of seeking to understand the problems or challenges of an organisation or community, it would seek to understand the strengths. The hypothesis here is that by solely focusing on problem areas, the evaluation legitimates and reproduces problems and challenges. In terms of evaluation, an appreciative enquiry assessment of a programme

would seek answers related to what is working well and how to enhance those aspects, as opposed to seeking to define and fix problem areas (Hammond, 1998; Copperrider et al, 2008).

A common method used in appreciative inquiry is the *4D Model*. This is essentially a framework of questioning that stakeholders can consider across four domains. Coghlan et al (2003) provides a useful description of the *4D Model*:

- Discovery: what is the best of what is? (appreciating what is best in the organisation at this moment)
- Dream: what might be? (envisioning results for the organisation)
- Design: what would be the ideal? (constructing the future of ideals for the organisation)
- Destiny: how to empower, learn and adjust or improvise? (sustaining the change).

Coghlan et al (2003) also provide useful examples of organisations that have used appreciative inquiry for evaluation, including a child development organisation working with children with disabilities. The process this organisation went through included:

- The construction of an internal committee that then devised and oversaw the whole process
- An appreciative enquiry expert being engaged for advice, training and guidance throughout the process
- 20 interviewers being trained
- Interviewers conducting 140 interviews with key stakeholders over six week period, asking key questions about their best and most positive experiences of the organisation, its programmes and services
- Hosting a two-day conference with 56 key stakeholders that focused on the dream and design stages of the *4D Model*
- Senior management team taking the ideas and designs from the conference and leading implementation (Coghlan et al, 2003).

While the process took time, outside expert knowledge, training and commitment, the organisation reflected that the benefits included:

- Significant change with staff focus on core organisational purpose and values (staff regularly asking the question: 'how is what we are doing building a more meaningful life for people?')
- A clear strategic direction for the future
- Significantly strengthened relationships and participation with external stakeholders that had multiple benefits including increase donor revenue (Coghlan et al, 2003).

Asset Based Community Development

A related field to appreciative inquiry particularly relevant for this review is Asset Based Community Development (ABCD). ABCD practitioners assert that if you start development work with a community by seeking to understand all of its needs (neediness), massive social problems and practical challenges, you will end up with fragmented unsuccessful solutions. Further, ABCD suggests that the community or organisational members themselves have the solutions and wisdom to devise solutions to challenges as they define them. Resourcing and responding based on traditional community needs assessment privileges service provider's needs, rather than the communities themselves. Putting service providers at the centre can reproduce dependence on external services and professionals, and disempower local community leadership. (Kretzmann and McKnight, 1993).

Appreciative Inquiry Summary

Summary	How It Measures	What it Measures
A process rich methodology that uses a questioning framework to illicit current strengths in a programme or organisation.	Uses questioning framework (e.g. 4D Model) through a well facilitated process. Seeks answers to what is working well and works to enhance those areas. May well require training and external support/advice.	Current strengths and capacity (the positives and areas that are working well).

Empowerment Evaluation

Empowerment evaluation is connected to collaborative and participatory models of evaluation, and at the core of these approaches is the meaningful participation of those being evaluated. Empowerment models of evaluation have grown in popularity especially in community and social development. Much of this popularity will be due to the alignment of the model to traditional social and community development ethics privileging participatory approaches to practice. These models of evaluation are seen to be effective at giving voice to a range of stakeholders involved in a programme or organisation, including staff at all levels, clients, stakeholders and community members (Miller and Lennie, 2005; Scriven, 2001; Fetterman, 1998). Such emphasis on participation draws similarities to ABCD and appreciative inquiry approaches.

Empowerment evaluation is an internally led process, as opposed to some traditional evaluation methods, which are led by external, expert evaluators. If evaluation professionals are used, they are there as 'critical friends' and advisors, rather than experts coming into to make judgements on programme effectiveness. Wandersman et al (2005) provides a clear overview of empowerment evaluation and outlines ten key principles. Miller and Lennie (2005) summarise the principles well (reproduced below):

1. **Improvement** of people, programmes, organisations and communities to help them achieve results
2. **Community ownership** with stakeholders taking joint responsibility for designing and conducting the evaluation and putting the findings to use
3. **Inclusion** of participants, staff from all levels of a programme or organisation, funders, and members of the wider community
4. **Democratic participation** based on shared decision-making, deliberation, communicative action and authentic collaboration
5. **Social justice** goals, with high value placed on addressing the larger social good and achieving a more equitable society through capacity building

6. **Community knowledge**, information and experience is valued and respected and used to make decisions, understand the local context, and interpret evaluation results
7. **Evidence-based strategies** and empirical justifications for action are utilised, recognising the need to adapt existing tools to the local environment, culture and conditions
8. **Capacity-building** of programme staff and participants to conduct their own evaluations through the appropriate tools and conditions
9. **Organisational learning** through continual reflection on and evaluation of programmes and organisations, resulting in increased responsiveness to changes and challenges and hence guidance for improvement
10. **Accountability**, of individuals and organisations for the commitments they make and of funders in relation to their expectations."

(Miller and Lennie, 2005, p 19).

A practical empowerment evaluation method is the three step workshop based method:

1.) The first step is developing a mission and vision, and focuses on workshop participants reaching consensus on key statements which capture the mission and vision of the programme, service or organisation. These statements should also seek to incorporate the values of key stakeholders, and should be undertaken even if there is an existing mission and vision established. (Miller and Lennie, 2005).

2.) The second step of the process is called 'taking stock' and starts with brainstorming all the activities of an organisation, programme or service, and then rating those activities in order of importance. This should also be done within a group workshop environment and the discussion should start to elicit programme strengths and weaknesses.

3). Step three takes the activities identified in step two and sets goals for each of them together with strategies that will help reach those goals and the evidence (checklists, meeting minutes, surveys, etc) that will be used to monitor progress. (Miller and Lennie, 2005; Fetterman and Wadersman, 2008).

Following the three steps, workshops take place to plan and implement the evaluation in more detail. Workshop participants undertake data collection and analysis, supported by evaluation experts. If empowerment evaluation is well entrenched within an organisation's culture, these steps should become an ongoing process. (Miller and Lennie, 2005).

Miller and Lennie (2005) outline the evaluation of the Good Start Breakfast Club (a programme of the Australian Red Cross) as a positive example of empowerment evaluation in action. The process included a pre workshop survey followed by a workshop with programme management staff which:

- revised vision and mission statements for the programme
- came up with ten core activities of the programme
- rated the ten core activities
- established goals, strategies and forms of evidence for each of the ten activities.

Later workshops were held with the core programme delivery staff, programme volunteers and teachers that focused on revising and reviewing the goals, strategies and evidence previously identified.

Empowerment evaluation approaches tend to be strong on qualitative, workshop style data gathering, which often will fit well with community and social organisational cultures and working styles. Advocates of empowerment evaluation approaches argue that traditional models of evaluation disempower the communities and clients of the programmes and services being evaluated. The critique here is that any evaluation in the social or community sectors should seek to be collaborative. A counter critique would suggest that often evaluations need independence or confidentiality where the evaluator being 'removed' from the intricate business of the programme has distinct advantages. (Scriven, 2001; Fetterman and Wadersman, 2008).

Empowerment Evaluation Summary

Summary	How It Measures	What it Measures
Internally led, rather that external expert led process that seeks to meaningfully involve those being evaluated.	Three steps worked though with stakeholders usually using a workshop approach: 1. Developing a mission and vision 2. Taking stock 3. Planning for the future Will require evaluation expertise which may need to be sourced externally To be done well, needs to be an ongoing process, requiring a change in the way the organisation operates	Progress against mission and vision of an organisation or programme through assessing progress against goals against agreed indicators/measures.

Social Value

Social value is a broad concept rather than a specific evaluation methodology, and is interested in the value social programmes have on people's wellbeing, connection to communities, and their ability to participate in decision making that affects them (Best, 2008). Social value methodologies include Social Return on Investment (SROI) and Social Capital - both seek to answer the core question of what sort of difference is being made and how much of a difference is being made.

Mulgan (2010) provides a comprehensive overview on measuring social value drawn from his vast experience working across a large range of public sector, NGO and social enterprise ventures. The analysis he has is based on an understanding that "…most modern economists now agree, value is not an objective fact…value emerges from the interaction of supply and demand, and ultimately reflects what people or organisations are willing to pay" (p. 40). For some this could be a contentious concept, however Mulgan suggests the reason many social value metrics fail is because they assume value is objective.

Measuring social value is challenging. The complexity of human beings, and communities, in the social field, results in no black and white, scientific rules about what works and what does not: "…although evidence should inform all action, very few domains allow precise predictions about what causes will lead to what effects." (Mulgan, 2010, p. 40). Additionally there is not always agreement about what outcomes should be, and many social value metrics are unreliable or too limited (for example by only measuring costs and benefits). (Mulgan, 2010; Mulgan et al, 2006).

A further challenge is that many social enterprises and NGOs have adopted social value measurement tools as an 'all in one' solution to achieve accountability to external stakeholders, guide internal decision making and assess the broader social impact of the programme/s of the organisation. Mulgan challenges this approach, and suggests that those who try to achieve all three of these objectives with one tool are unlikely to achieve any of them well. He makes the simple comparison to private sector organisations, suggesting that corporations would be very unlikely to use one set of metrics to explain to external parties how it spends its money, allocate its resources internally, and explain how its work affects larger goals and benefits. (Mulgan et al, 2002; Mulgan, 2010).

A summary of Mulgan's thinking on ten different ways of measuring social value is included in appendix C.

Social Capital

Social capital is interested in the value social connections, networks, and relationships have in getting economic, community, or social value. There is an intrinsic interest in the quality of connections and networks people have. Higher quality networks, relationships and connections will lead to greater access to resources. Programmes focused on building social capital may prioritise building quality relationships, neighbourhood development, engendering trust between strangers and increasing people's sense of safety in their neighbourhood. (Coburn, 2009; Zappalà, 2011).

An example of social capital within a policy framework is the *Youth Development Strategy Aotearoa* (YDSA). The positive youth development approach the YDSA is based on has six key principles, two of which are: 'youth development is about young people being connected' and 'youth development happens through quality relationships'. (Ministry of Youth Affairs, 2002, p. 15). These two principles are clearly about the social capital young people have, the hypothesis being that if there is a high quality of social capital (relationships and connections), young people's resilience to challenging risk factors will be increased. From a community development point of view, individuals that are enabled and empowered to build their own social capital will lead to stronger communities, and stronger communities are more resilient communities.

In terms of measuring social capital, Statistics New Zealand has done some significant work in this space and outlines a framework for measurement that seeks to measure social capital across four key domains:

- behaviours (what people do)
- attitudes and values (what people feel)
- population groups (what people are)
- organisations (social structures that reflect attitudes and behaviours and are the vehicles for behaviours) (Spellerberg, 2001, p 17).

The framework includes a range of factors that can be measured within each domain, for example the level of community participation, outlook and confidence in the future, religious institution connection, employment status, numbers or organisations in a community, and number of 'members' within those organisations. (Spellerberg, 2001).

The World Bank has developed the *Social Capital Assessment Tool* (SOCAT). It is a multifaceted instrument developed to collate social capital data at the household, community and organisational levels (Grootaert and van Bastelaer, 2002). The tool collects both quantitative and qualitative data and produces detailed information about structural and cognitive social capital. (Grootaert and van Bastelaer, 2001; Grootaert and van Bastelaer, 2002).

Social capital measures are unlikely to be useful for specific programmes or services, or individual organisations for evaluation purposes. Their value will be to assess the levels of social capital, and the changes over time, of a community or population group of size. Community development organisations working with communities or populations of size may find social capital to be of considerable value however. It is likely that all agents of community development working with the population or community would need to collaborate to measure social capital effectively and the affects programmes have on social capital changes over time.

Social Capital Summary

Summary	How It Measures	What it Measures
Interested in the quality of networks and relationships people have and the economic, social and community value they can provide.	Measures factors against key domains (e.g. behaviours; attitudes and values; population groups; and organisations). To be done well, it is likely to require collaboration of a range of community development organisations in an area collaborating. Would require a clear population of size to be identified (e.g. a local authority population).	The quality and value of social connections, networks, and relationships and the impact they have in getting economic, community, or social value.

Social Return on Investment

Social Return on Investment (SROI) is a framework for measuring and reporting on the social, environmental and economic value that is being created by an organisation or programme. Rather than being a distinct methodology in its own right, it is more of a model (with a range of tools) of impact assessment and evaluation. SROI uses tools from cost-benefit analysis, social accounting and social auditing, which captures social value by translating social objectives into financial, and non-financial, measures. (Nicholls et al, 2007; Nicholls et al, 2012).

SROI measures the value of the benefits compared to the costs related to achieving those benefits. "It is the ratio between net present value of the benefits to the net present value of the investment., for example, a ratio of 3:1 indicates that an investment of $1 delivers $3 in social value" (Nicholls, 2012, p. 8). SROI "…seeks to reduce inequality and environmental degradation and improve wellbeing by incorporating social, environmental and economic costs and benefits" (Nicholls, 2012, p. 8).

The SROI Network details seven important principles for SROI (reproduced below):

1. **Involve stakeholders:** Understand the way in which the organisation creates change through a dialogue with stakeholders
2. **Understand what changes:** Acknowledge and articulate all the values, objectives and stakeholders of the organisation before agreeing which aspects of the organisation are to be included in the scope; and determine what must be included in the account in order that stakeholders can make reasonable decisions
3. **Value the things that matter:** Use financial proxies for indicators in order to include the values of those excluded from markets in same terms as used in markets
4. **Only include what is material:** Articulate clearly how activities create change and evaluate this through the evidence gathered
5. **Do not over-claim:** Make comparisons of performance and impact using appropriate benchmarks, targets and external standards.
6. **Be transparent:** Demonstrate the basis on which the findings may be considered accurate and honest; and showing that they will be reported to and discussed with stakeholders
7. **Verify the result:** Ensure appropriate independent verification of the account.

(The SROI Network, 2011, p. 3; Nicholls et al, 2012, p. 96-98).

SROI analyses can be conducted as evaluative exercises, which look back and calculate social value that has already been achieved by a programme. An analysis can also be a forecast exercise, which will predict how much social value may be created from a programme. For both types of analyses, six key steps should be followed:

1. Establishing scope and identifying key stakeholders: getting clear about what the SROI analyses will cover and who will be involved
2. Mapping outcomes: similar to many other evaluation methodologies, this step involved working with stakeholders to develop a programme logic (or theory of change) or similar model which identifies and connects inputs, outputs and outcomes.
3. Evidencing outcomes and giving them a value: identifying data to show whether outcomes have been achieved, and then giving them a value
4. Establishing impact: Following evidence on outcomes bring collected and monetised, aspects of change that would have happened anyway or are a result of other factors are eliminated from the analyses

5. Calculating the SROI: adding up all the benefits, subtracting any negatives and comparing the result to the investment
6. Reporting, using and embedding: involves sharing findings with stakeholders, embedding good outcomes processes and having the SROI analysis verified by an SROI practitioner/expert. (Nicholls et al, 2012)

Social Ventures Australia (SVA) completed an SROI analysis for Food Connect, a Sydney-based social enterprise that provides ethically grown produce to community groups. Five major stakeholder groups were identified as potentially benefiting from Food Connect. Food Connect is a franchise model, hence the reference to a national foundation. City Cousins are individuals, businesses, schools, churches and other or groups that act as the drop off point for produce, so that food can be dropped off during the day and subscribers can collect later on (Coellen and Faivel, 2011). The stakeholder groups are detailed below with stated social benefits:

- "**Farmers** who will benefit from a reduction in the length of the value chain by selling their produce directly to subscribers, cutting out many of the middle men, increasing their revenue and experiencing increased self-esteem, optimism and sense of community
- **Subscribers** who will benefit from having access to a diverse range of healthy, seasonal fresh foods of high nutritional value and supporting their local farmers
- **City Cousins** who will benefit from an increased sense of community and the ability to support local farmers
- **Food Connect National Foundation** who will benefit from increased revenue which will assist them towards creating a sustainable food system
- **Federal government funders** who will experience benefits from increased savings in welfare payments and increased income taxes." (Coellen and Faivel, 2011, p. 2).

The SROI analysis costed specific and real outcomes from the Food Connect programme for each of these stakeholder groups. The overall result was a social return on investment of 7.96:1. This means for every dollar invested in the period under review, $7.96 was returned in social value. (Coellen and Faivel, 2011).

Advocates of SROI would promote its flexibility in measuring change in ways that are meaningful to organisations and their stakeholders, being careful to clarify that while impact measured through monetisation is an important part of the model, it is not the only way to measure impact. SROI is interested in telling a story about social, community and environmental impact using financial, time and other resource use as the narrative. It is said to clearly articulate value in ways that are easily measured and understandable to all. (Communities Scotland, 2006; Nicholls et al, 2007).

Critics of SROI would outline the challenges with the approach including its complexity and intensiveness. Detailed cost analyses of the organisation's work areas is a key requirement of SROI. This can be time consuming, especially for the first time. The clear focus on monetisation can lead to misuse of SROI tools, creating situations where organisations go about costing up their impact without following steps to clarify its mission, values and stakeholders. This can result in inappropriate indicators being selected. Further, some outcomes will be difficult to monetise (for example, improved community relationships) and this will create a challenge in implementing an SROI approach. (Communities Scotland, 2006; Nicholls et al, 2012).

Mulgan (2010) suggests tools like SROI often arbitrarily estimate costs and benefits which obviously follow on to create the stated financial value. He suggests that SROI may be well suited to broad predictions and analyses, but not detailed decision making.

Social Return on Investment Summary

Summary	How It Measures	What it Measures
Seeks to measure social value by translating social outcomes into financial and non-financial measures.	Detailed cost analyses of organisational (or programme) work. Identify data to show whether outcomes have been met, and give the outcomes a financial value. Establish cost of the inputs required to reach the outcomes (staff time, programme costs, organisational costs etc). Identify changes that would have happened anyway or are a result of other factors (not the service or programme) – and eliminate them from the analysis. Add up all of the benefits, subtract any negatives and compare the result to the cost of the inputs (investment).	The value of social benefits compared to the costs of achieving those benefits. Social, environmental and economic outcomes and uses monetary values to represent them.

Outcomes Based Evaluation and Planning

Programme Logic, Theory of Change and Results Based Accountability (RBA) are all outcomes based evaluation methodologies. These models ask us to think about what we want the end result of our programmes or services to be. The planning process then works back to identify what activities will achieve that outcome and how to measure the impact of those activities on the particular outcomes. (Friedman, 2005; Trotman, 2008).

Planning for outcomes uses audience needs and desired results as the foundation for designing programmes or services. Simply, these approaches are most interested in assessing the result of what a programme, service or organisation does – and results should be derived from what the 'audience' (client group or community/ies served) need. In terms of community development practice, positive outcomes may include changes in communities (for example, reduced crime rates and safer

communities) or changes in people or groupings of people within those communities, that in turn lead to community benefit (for example, increased practice of identified crime prevention strategies by community members). (Burns and MacKeith, 2006).
One of the significant benefits of outcomes based planning is its flow on alignment to other key organisational functions such as reporting on outcomes, prioritisation, staff development, programme or organisational performance, contract or funder accountability, and of course, evaluation. (Duignan, 2010a).

Results Based Accountability

Results Based Accountability (RBA) is a planning and evaluation model developed by Mark Friedman. It is often referred to as Outcomes-Based Accountability, and focuses on embedding an outcomes based decision making approach into planning social programmes, social service systems and entire organisations. Results Based Accountability is widely used in New Zealand and a number of government departments use it as a planning and monitoring model with their partnerships with community organisations. This signalled a significant shift away from counting inputs and outputs (how many people received a service or attended a programme) to measuring outcomes (what was the result of that service or programme). (Friedman, 2005; Annie E Casey Foundation, 2007).

RBA has a number of key steps that are described by a number of commentators, summarised well by the Johnson et al (2008) below:

1. convene stakeholders
2. select desired results and indicators
3. gather baseline and trend data
4. investigate the story behind the baseline and trends
5. learn about effective intervention strategies ("what works" to do better)
6. recommend and implement a change strategy based on knowledge and consensus
7. repeat the cycle.

The National Center for Children in Poverty describes the RBA process used across many American states to assess the impact of early childhood programmes on child and family well-being. The Center has worked with local state agencies to develop appropriate outcomes and indicators and associated data sets that early childhood programmes can be assessed against. Example high level indicators developed include 'percentage of children reading proficiently in grade four' and 'percent of children beginning school with undetected developmental delays or chronic health problems'. (Johnson et al, 2008).

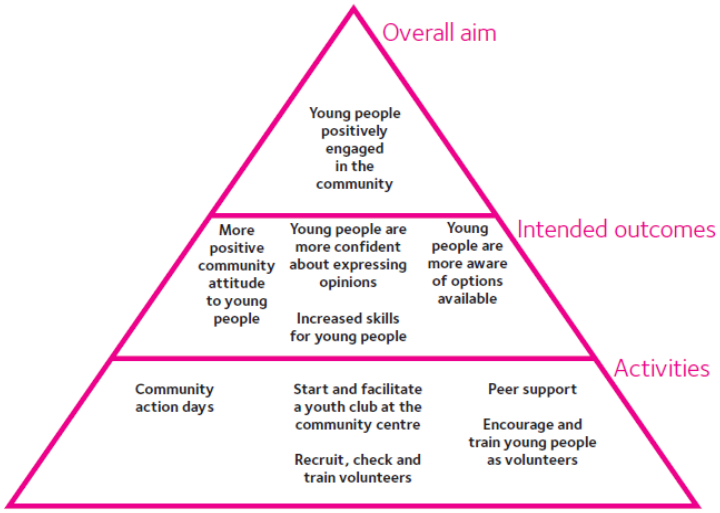
Proponents of this model suggest that it encourages planning and reflection about the people a programme or organisation is for (who do we work with and how do we work with them), and quickly gets people from talk to action. (Friedman, 2005; Kusek and Rist, 2004). Trotman (2008) advises that if you bring the right people in your organisation together for a facilitated meeting, and ask the right questions (e.g. see Freidman, 2005), the core of an evaluation plan should evolve.

Programme Logic

Programme logic or logic modelling has strong connections to the theory of change aspect of the Annie E Casey Foundation's advocacy work evaluation described earlier (Reisman et al, 2007; Trotman, 2008). Both approaches are likely to result in a diagrammatic model that tells the story of a programme or service, or indeed a whole organisation's work. This story essentially illustrates the

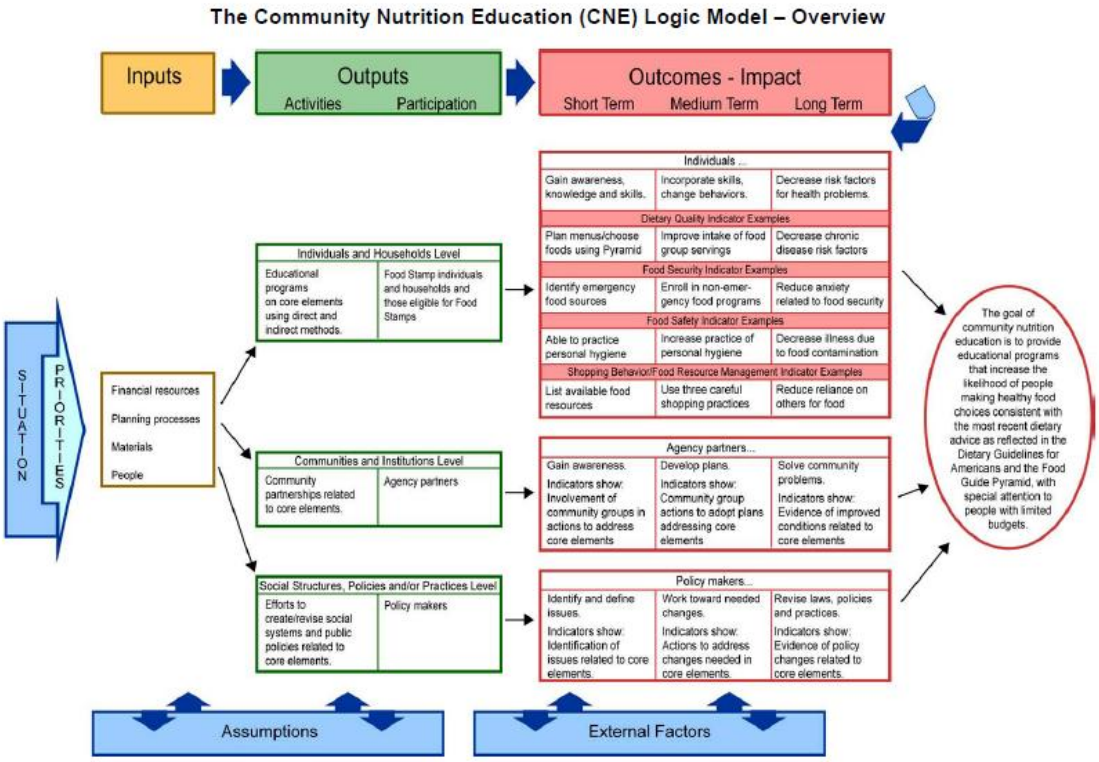
causal connections between the need or goal identified and what needs to be done to respond to it, and importantly, make a positive difference or improvement. (Scriven, 2001; Evaluation Support Scotland, 2009; Ilic and Bediako, 2011).

There are many types of logic model. The planning triangle is perhaps the simplest version which has a simple stepped approach in the form of a triangle, with the tip of the triangle being the programme aim, the centre section being the programme outcomes, and the base of the triangle being the activities. An example using a youth service is reproduced below. The hypothesis here is that the activities will achieve the outcomes, and the outcomes being met should mean the aim is reached. (Cupitt and Ellis, 2007; Evaluation Support Scotland, 2009).



(Burns and MacKeith, 2006, p. 9).

There is a range of more complex models, which can illustrate short, medium and long term outcomes and draw specific connections between activities and outcomes, as well as include inputs, outputs and specific assumptions that have been made. The University of Wisconsin has developed a model which will cater to more complexity (Taylor-Powell et al, 1996). This model has been widely used by the New Zealand Ministry of Health. An example using a community nutrition programme is below



Sourced from: http://www.uwex.edu/ces/pdande/evaluation/evallogicmodelexamples.html

One other model is included in appendix B.

One of the key parts of any programme logic model is the outcomes. The model will also include activities that will contribute to outcomes. There are usually assumptions that will need to be made at this point, and it is important to recognise and note those assumptions so they can be checked or tested when evaluating.

Like Results Based Accountability, an effectively facilitated meeting with the right people could produce the basics for a logic model. Anderson's (2005) guide to theory of change provides a useful outline for facilitators of such meetings. It is important to commit to continued discussion on the model; the connections between activities and outcomes; and the connections between the objectives or aims and the outcomes. Laycock (2005) describes this on-going refinement process well.

Programme logic development that is centred around public sector and other funders increased interest in using the model as a way to monitor providers, could provide some challenges. If models require sign off from particular invested stakeholders (e.g. funders) and not other critical stakeholders (e.g. service users of communities of interest), critiques of bias and impartiality may be a risk (English and Kaleveld, 2003).

Outcomes Based Evaluation and Planning Summary

Summary	How It Measures	What it Measures
Systems of planning and evaluation that are most interested in assessing the result of what a service, organisation or programme achieves for the intended audience, client group or community.	Develops a model (or diagram) that illustrates links between organisational, programme or service overall aims, outcomes and activities. Draws causal links between outcomes and activities. Uses agreed data to assess progress against outcomes.	Impact of programme activities on desired outcomes.

Balanced Scorecards and Dashboards

The Balanced Scorecard was developed in the early nineties by Kaplan and Norton as a way to measure organisational performance. While developed as a management tool, it is increasingly being used in the social sector as a way to monitor progress against strategy and communicate that to both internal and external stakeholders. Kaplan and Norton have developed both a corporate and not for profit model of the scorecard (Frumkin, 2011; Accounts Commission for Scotland, 1998).

A scorecard or dashboard can be a very powerful tool to get a snapshot of how an organisation or programme is doing. It creates (usually in a single table or diagram) a picture of how a programme or organisation performs across agreed domains (Kaplan and Norton suggest mission, financial, donors, clients, and processes, as possible domains suitable for nonprofits). Within those domains is a range of data that has been agreed on as meaningful metrics to measure performance in that domain. (New Economics Foundation; Frumkin, 2011).

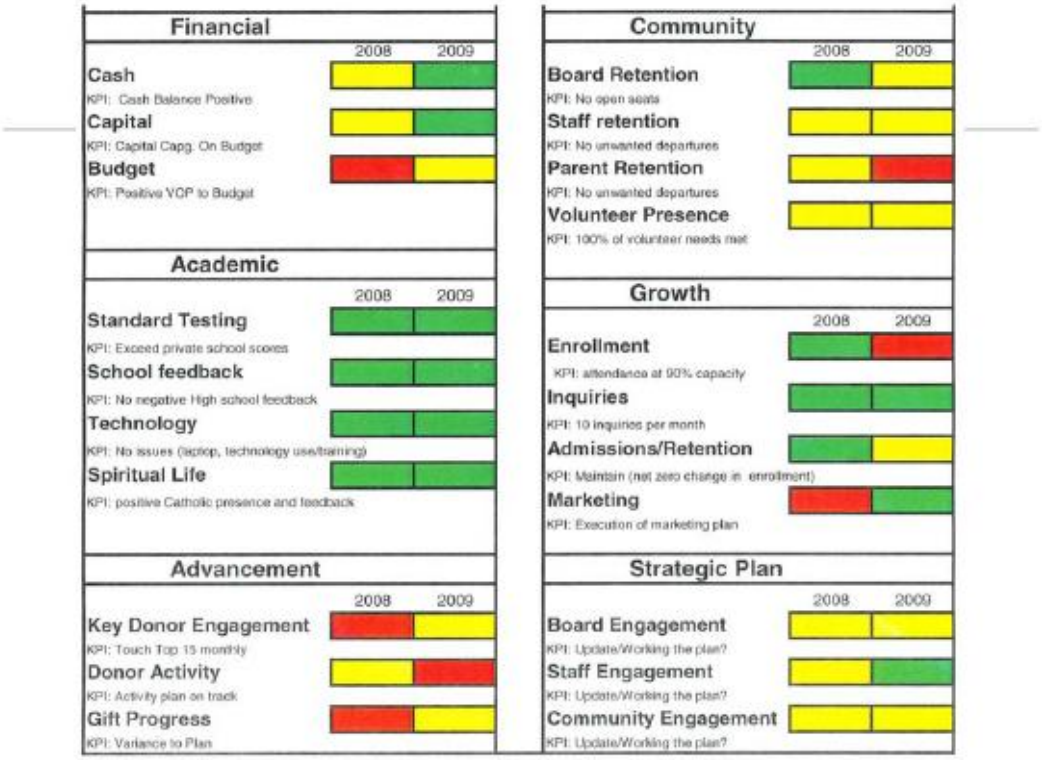
As an example, if membership engagement was a domain of relevance, an organisation may use metrics like member retention rates, level of member readership of particular communications products, member engagement in social media, and/or member participation in particular programmes.

The *Third Sector Performance Dashboard* was developed by Social Firms UK for a range of community organisations and social enterprises to monitor their progress against objectives and report on performance. The tool has a range of templates and samples for organisations to use and adapt. (Social Firms UK; New Economics Foundation).

The Accounts Commission for Scotland outlines five key steps for developing an effective balanced scorecard. The first two steps are to establish goals/aims, and identify key activities or initiatives required to reach each goal. These steps are very similar to the outcomes planning approaches. The third step is to group the initiatives and activities under the scorecard domains or perspectives. This is not a perfect process, and will be subjective, but should help to understand whether there is a good *balance* across chosen domains. Step four is about identifying appropriate measures for each of the actions and initiatives, and step five focuses on monitoring the measures over time. (Accounts Commission for Scotland, 1998).

Whatever domains are chosen there is a need to strike the balance. Frumkin (2011) suggests for a social sector dashboard to be effective it must include financial sustainability, social impact and stakeholder engagement as domain groupings.

An example dashboard for a school is reproduced below.



(Frumkin, 2011, p. 40).

Scorecards and dashboards are simple tools – this is both a strength and a weakness. They provide quick access to critical data for those reviewing them, which is an effective way to provide real time feedback to staff, boards and external stakeholders. Some would argue that it is just a set of quantitative indicators which by nature cannot effectively measure the longer term outcomes or impacts of social programmes. Organisations may also find developing the dashboard, collecting the data regularly, and analysing the data, time consuming, and when considering its limitations may not be able to justify that time resource investment. (Frumkin, 2011; New Economics Foundation).

Scorecards and Dashboards Summary

Summary	How It Measures	What it Measures
Give a snapshot of how an organisation or programme is doing, against a set of domains.	Captures agreed key data within a range of agreed domains that gives an easily understandable picture or performance. Requires regular collection and analyses of multiple data sets.	Data that acts as a meaningful metric of performance across key domains like mission, financial, donors, clients, and processes.

Developmental Evaluation

Developmental evaluation is a relatively new and emerging form of evaluation that is getting increasing attention, especially in the community and social spaces. It emerged as a response to desires to support on-going learning and development as a part of the evaluation exercise, as opposed to the more traditional progression of planning, then doing, then evaluating. Proponents of developmental evaluation would argue that the complexity, fast change, responsiveness, and high levels of innovative practice common in the social sectors, requires more flexible approaches to evaluation. (Whaley and Weaver, 2010; Inspiring Communities, 2010).

Dozois et al (2010) describes the key differences between developmental evaluation and more traditional models of evaluation well, highlighting that "the primary focus is on adaptive learning rather than accountability to an external authority" (p. 14) and that the purpose of developmental evaluation "…is to provide real-time feedback and generate learning to inform development" (p. 14). A key difference to more traditional independent evaluations, is that the evaluator is directly involved in the organisation or programme and "…actively intervenes to shape the course of development, helping to inform decision-making and facilitate learning" (p. 14).

Gamble (2008) suggests developmental evaluation is well suited to social innovations and similar projects that are in early stages of development. Gamble also suggests three key stages in developmental evaluation. The first stage is about framing the issue – this can involve the evaluator helping the organisation conceptualise and articulate the issue/s and associated dynamics. The second step is testing quick iterations and is about capturing all the informal data that many practitioners will act on as a part of regular practice. This includes feedback loops, and the tweaks and refinements that are made to programmes or services as a part of day to day experience and observations. The third step is tracking the trajectory of the innovation (or service or programme) and records the incremental adjustments made, mistakes, learning, unintended consequences and opportunities, all to inform future learning and development. (Gamble, 2008).

An example of developmental evaluation is *The Old Brewery Mission,* a shelter for homeless people in Montréal, Canada. A known innovator in delivering services for the homeless was brought in to evaluate the services offered. "He did this by talking to the residents and making observations. He

stayed in the shelter for two days a week for nine weeks, introducing himself as a resident writer mandated to give advice on possible improvements. After his stay, he provided a lengthy report that included many challenging recommendations. These recommendations carried weight because he had credibility in the field; he had the trust and confidence of both front-line staff and management; he had no particular vested interest in the outcomes; and the recommendations were based on solid data." (Gamble, 2008, p. 37-38).

As an emerging area of evaluation, developmental evaluation is unlikely to have high credibility with external funders as a model of accountability. However, it could well be combined with other, more legitimised, evaluation models as described by Whaley and Weaver (2010).

Developmental Evaluation Summary

Summary	How It Measures	What it Measures
A process of evaluation that is more interested in evaluation as an adaptive learning exercise, rather than an accountability exercise.	The three step process: 1. Frames an issue 2. Testing quick iterations (including the use of feedback loops) 3. Tracking the trajectory of the innovation. Requires developmental evaluator/s to come into the programme or organisation to lead the evaluation. Has a focus on learning, therefore requiring organisational commitment to on-going learning and development.	Real-time feedback on programmes or services, with a focus on generating learning and service or programme development.

Creative and Innovative Evaluation Tools and Approaches

In addition to the methods and methodologies to evaluation discussed in detail, the table below outlines seven practical tools that are providing value in evaluating community and social development work. The methodologies they would align to are mentioned within the descriptions, and also recorded in the summary of methodologies in appendix A.

Tools	Description and Methodological Fit
Do View	New Zealand based Paul Duignan, has been a key participant in the development of the *Do View* software, which is used by many New Zealand and offshore government and community organisations. Duignan

Paul Duignan	argues that to do effective outcomes based planning and evaluation, effective software is a critical tool. The software creates a visual outcomes model, in this instance called the *Do View Results Roadmap.* (Duignan, 2010a; Duignan, 2010b). ***Use this tool with these methodologies*** ▪ Outcomes based evaluation
Outcomes Star *Triangle Consulting Social Enterprise*	The *Outcomes Star* has been developed and re-developed over time and focuses on supporting positive change for service users and community members. In this way different versions of the model have developed for a number of work areas (learning disability, sexual health, family violence and others) and population groups (young people, older people, children and others). (MacKeith and Graham, 2010). ***Use this tool with these methodologies*** ▪ Outcomes based evaluation (Results-Based Accountability or Programme Logic approaches)
Shared Measurement Platforms *FSG Social Impact Advisors*	"Organisations choose from a set of measures within their fields, using web-based tools to inexpensively collect, analyse, and report on their performance or outcomes. Benefits include lower costs and greater efficiency in annual data collection, expert guidance for less sophisticated organisations, and improved credibility and consistency in reporting." (Kramer et al, 2009, p. 1). ***Use this tool with these methodologies*** ▪ Outcomes based evaluation (Results-Based Accountability or Programme Logic approaches)
Adaptive Learning Systems *FSG Social Impact Advisors*	"These systems engage a large number of organisations working on different aspects of a single complex issue in an ongoing, facilitated process that establishes comparative performance metrics, co-ordinates their efforts, and enables them to learn from each other." (Kramer et al, 2009, p 1). Improved alignment of goals among the different organisations and more collaborative problem solving are two key benefits.

	Use this tool with these methodologies ▪ Developmental evaluation approach ▪ Could also be useful as a part of measuring social capital
Photography *Hidden Gardens, Scotland*	The Hidden Gardens parents and toddlers group in Scotland needed simple evaluation methods. They took photos of weekly activities and asked parents to put a sticky dot on the ones they had tried at home. (Evaluation Support Scotland, 2012). This simple strategy could be used across a variety of evaluation approaches. ***Use this tool with these methodologies*** ▪ Empowerment evaluation ▪ Appreciative inquiry ▪ Developmental evaluation ▪ The data recorded could potentially be used as an indicator for outcomes based evaluation methods
Quality Circles *The Young Foundation*	Quality circles are one of The Young Foundation's models of innovation evaluation suggested for local authorities to engage residents. They are essentially forums or meetings with no more than ten people that "…bring together end users, experts, academics and practitioners involved in delivery, to address logistical concerns and resource allocation" (Cordes and Sellick, 2011). The hypothesis here is that by bringing these different perspectives together, specific problems relating to both the delivery and use of a service can be addressed. (Cordes and Sellick, 2011). Like the photography example, Quality Circles could be used across a variety of evaluation approaches. ***Use this tool with these methodologies*** ▪ Empowerment evaluation ▪ Appreciative inquiry ▪ Developmental evaluation ▪ The data recorded could potentially be used as an indicator for outcomes based evaluation methods
Prove It!	Prove It! was developed by the UK based New Economics Foundation in partnership with Groundwork UK and Barclays Bank to provide a method for measuring the

New Economics Foundation	effect of community regeneration projects on the quality of life of local people. It is a particularly useful tool for organisations interested in high levels of local community involvement and measuring the extent to which a project alleviates social exclusion. The model has three key components: ▪ A Storyboard – which is about mapping how a project's activities will lead to change ▪ A Survey - to be used at the start and end of a project with project participants/community members/stakeholders ▪ A Project Reflection Workshop – which is designed for all key project participants to look back on what happened during the project's life. (nef Consulting, 2009). *Prove It!* is a full evaluation method in its own right, and could fit well with the philosophies and key tasks of a number of evaluation approaches. ***Use this tool with these methodologies*** ▪ Empowerment evaluation ▪ Could also be a very useful tool to elicit data for measuring social capital

CONCLUSION

Some community development organisations are small community projects working directly with community members. Others focus on supporting the many organisations and groups that do work with communities and their members, in a community brokerage role. There are also large community development programmes that may well be a part of public sector organisations like government departments of local government. Understanding the role of community development organisations is important to understand when considering what evaluation approaches will work best.

It is important to take time to plan evaluation and to integrate evaluation into the planning work of an organisation. Identifying what is to be evaluated, when and how is critical. If comprehensive evaluation is a desired goal of an organisation, meaning the full range of activities and their impact on the organisation's aims and goals are to be assessed, it is likely different types and levels or evaluation will be required at different times.

Project or programme level evaluations may be undertaken for specific projects at key points along the strategic plan life cycle of an organisation. Cluster evaluations may also be conducted, where a range of projects are grouped together and their collective impact on certain agreed outcomes are assessed.

The methodologies explored in this literature review have been used to evaluate many community development organisations and projects across the world including organisation-wide evaluation, project specific evaluation and cluster evaluations.

When thinking about evaluation community development practitioners should take time to design evaluation. Good design and planning should ensure that effort and energy is spent getting clarity and agreement on outcomes; and should take care not to try and use one tool to do too many jobs. Effective evaluation will need a selection of tools to account to external stakeholders, guide internal decision making and assess the broader social impact of the organisation's work.

Community development practitioners should maintain an active interest in the impact of the organisations', programmes and services they practice within. It follows, that an active interest in evaluation is a key part of effective community development practice. The questions from the introduction of this review call for reflection on:

- How does this programme increase inclusion and participation of people in their communities?
- What impact does this programme have on positive social connection between community members?
- What effect does our organisation have on community members' well-being?
- What impact does our work have on reducing inequality and social exclusion in this community?

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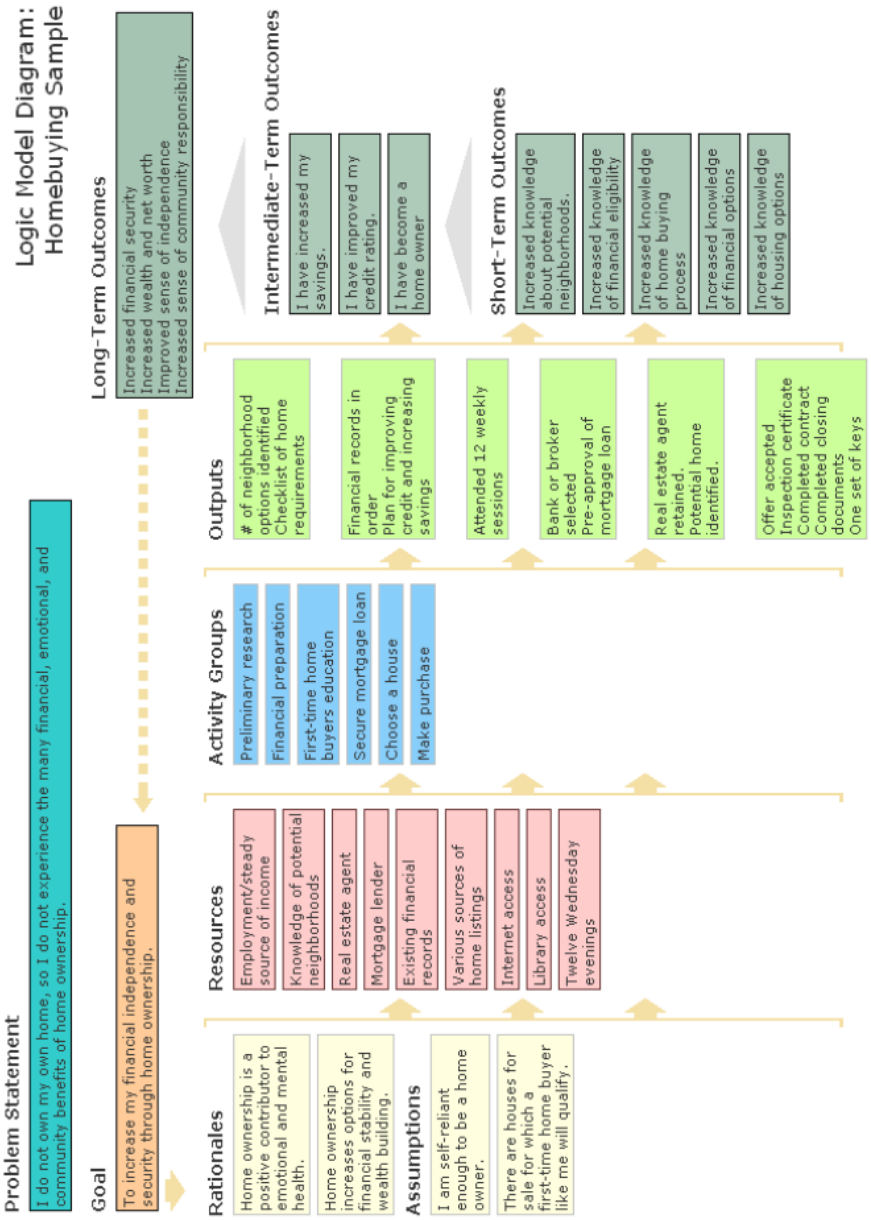
APPENDIX A: Summary of Community Development Evaluation Methodologies

Methodology	Method Example	Values Base	Resources and Limitations	Examples and Tools
Appreciative Inquiry	4D Model ▪ Discovery ▪ Dream ▪ Design ▪ Destiny	Looks for positives and areas that are working well, and seeks to affirm and build on those, as opposed to focusing on problem areas.	▪ Flexible approach that can be applied to programme or whole organisation ▪ Will require "questions"/discussion to be well facilitated ▪ Given its flexibility, organisations can choose the level of intensity and therefore the time and financial resources required	US based child development organisation *Hidden Gardens* Photography Quality Circles
Empowerment Evaluation	Three steps worked though with stakeholders usually using a workshop approach: 4. Developing a mission and vision 5. Taking stock 6. Planning for the future	Internally led, rather that external expert led Strong focus on participation of all stakeholders in evaluation, including staff at all levels, funders, clients, community members.	▪ Flexible approach that can be applied to programme or whole organisation ▪ Will require evaluation expertise which may need to be sourced externally, but should not be positioned as the evaluation leader ▪ To be done well, needs to be an ongoing process, requiring a change in the way the organisation operates	Good Start Breakfast Club (Australian Red Cross) *Hidden Gardens* Photography Quality Circles Prove It! www.proveit.org.uk
Social Capital	*A Framework for Measuring Social Capital* (Statistics NZ) *Social Capital Assessment* Tool (World Bank)	Interested in the quality of networks and relationships people have and the economic, social and community value they can provide.	▪ Not likely to work at programme level, and could also be problematic at an organisational level ▪ Would require a clear population of size to be identified (e.g. a local authority population) ▪ To be done well, it is likely to require collaboration of a range of community development organisations in an area collaborating	The Department of Internal Affairs has developed a Community Outcomes website that encourages agencies to work together to achieve community outcomes (many of which could also be called social value measures). www.communityoutcomes.govt.nz Adaptive Learning Systems www.fsg.org/Portals/0/Uploads/Documents/PDF/Breakthroughs_in_Measur

Methodology	Method Example	Values Base	Resources and Limitations	Examples and Tools
				ement_Exec_Summary.pdf Prove It! www.proveit.org.uk
Social Return on Investment (SROI)	SROI is a method in its own right	"Tells the story of how change is being createdby measuring social, environmental and economic outcomes – and uses monetary values to represent them." (The SROI Network, 2011, p. 2).	▪ Will require either well trained staff in SROI methods or external experts ▪ Initial introduction of SROI will require significant cost modelling work ▪ Requires clear outcomes to be established with high quality outcomes data ▪ Flexible in that it can be applied to programme or whole organisation	Food Connect www.thesroinetwork.org/publications/doc_details/123-food-connect-sydney-forecast-sroi-report
Outcomes Based Evaluation	Results Based Accountability (RBA) Programme Logic	Focused on tracking changes to people, communities or organisations over time 'Audience' (community, client) focused Most interested in outcomes rather than the inputs and outputs requited to get there	▪ Requires organisational commitment at every level and some protected time to develop and discuss outcomes, indicators and activities ▪ For best results, using external facilitation for workshops to develop core components of RBA or logic models is recommended ▪ Considering the popularity of both RBA and Programme Logic, there are many external resources (including models and worksheets) and resources people available to assist groups ▪ Regular, good quality data will be required	Youth Service Community Nutrition Programme Shared Measurement Platforms www.fsg.org/Portals/0/Uploads/Documents/PDF/Breakthroughs_in_Measurement_Exec_Summary.pdf *Do View* www.doview.com Outcomes Star www.outcomesstar.org.uk
Scorecards and	Scorecards and dashboards are	Primarily interested in	▪ Most suitable for whole organisation evaluation, as	School's dashboard

Methodology	Method Example	Values Base	Resources and Limitations	Examples and Tools
Dashboards	methods in their own right	measuring organisational performance	opposed to programme specific or community wide evaluations ▪ Requires regular collection and analyses of multiple data sets (time intensive) ▪ Quantitative data only and limited in its ability to measure longer term social outcomes	
Developmental Evaluation	The three step process: 1. Frame the issue 2. Test quick iterations 3. Track the trajectory of the innovation	Support on-going learning and development as a part of the evaluation exercise. Focuses on adaptive learning rather than accountability.	a. Requires developmental evaluator/s to come into the programme or organisation to lead the evaluation b. Has a focus on learning, therefore requiring organisational commitment to on-going learning and development c. Evaluators become a part of the organisation or programme for a period of time d. Unlikely to have credibility with funders as a model of performance, success or accountability for a programme or organisation	The Old Brewery Mission Adaptive Learning Systems www.fsg.org/Portals/0/Uploads/Documents/PDF/Breakthroughs_in_Measurement_Exec_Summary.pdf *Hidden Gardens* Photography Quality Circles

APPENDIX B: Programme Logic Model Example – *Buying a House*



(Innovation Network, 2011)

APPENDIX C: Mulgan's 10 Ways to Measure Social Value

10 Ways to Measure Social Value

METHOD	DESCRIPTION	EXAMPLE	PROBLEMS
Cost-Benefit Analysis/ Cost-Effectiveness Analysis	The most widely used family of tools; counts up costs and benefits (usually using some of the methods described below), and then applies discount rates. Often used for large public programs.	A recent study in the United Kingdom found that using a mix of drug treatment, surveillance, and behavioral interventions instead of prison saved taxpayers up to $130,000 per offender (and up to $300,000 if savings to victims were included).[1]	Disagreements about the actual numbers and weightings in the calculation, as well as the conclusions of the analysis.
Stated Preferences	Asks people what they would pay for a service or outcome.	A typical example would ask people what they might pay to preserve an endangered species or to build a park.	Stated preferences often do not correlate with actual behaviors.
Revealed Preferences	Examines the choices that people have actually made to infer the relative worth of different options.	A researcher analyzes house-buying patterns and real estate prices to infer how much people value public parks.	Few fields have enough usable data.
Social Impact Assessment/Social Return on Investment Assessment	Estimates the direct costs of an action, the probability of it working, and the likely change in future outcomes, sometimes with discount rates.	There are literally hundreds of tools of this kind, including Acumen Fund's Best Available Charitable Option Ratio methodology, Jed Emerson's blended value methods; and various Center for High Impact Philanthropy methods.	Disagreements about numbers, weightings, and conclusions: values; how to handle time and discount rates; and intended audience of the calculation.
Public Value Assessment [2]	Judges how much the public values a service.	The British Broadcasting Corporation assessed its public value.	Not rigorous enough.
Value-Added Assessment	In education, assesses how much a school adds to the quality of its pupils.	Recent uses often show that apparently successful schools are actually good at attracting clever pupils.	Sometimes too complex for parents or the media to understand.
Quality-Adjusted Life Years/Disability-Adjusted Life Years Assessment	In health care policy and research, accounts for patients' objective health and patients' subjective experiences.	Widely used set of measures. Provides a common way to judge the relative effectiveness of clinical treatments and public health measures.	Can be controversial when a particular treatment is not cost-effective.
Life Satisfaction Assessment	Judges social projects and programs by how much extra income people would need to achieve an equivalent gain in life satisfaction.	An imaginative study in Wales showed that modest investments in home safety, which cost about 3 percent as much as home repairs, generated four times more life satisfaction.[3]	New approach that remains unproven; highly sensitive to input assumptions.
Government Accounting Measures	In government, accounts for government spending and its effects.	France's *bilan sociétal* is a set of 100 indicators showing how enterprises affect society. Italy has a similar *bilancio sociale*.	Much variability across regions; disagreements about which indicators to include.
Other field-specific assessments	Every field has its own cluster of metrics.	A recent Young Foundation study identified nearly 30 measures of value in the built environment, including artificial neural networks, hedonic price models, fuzzy logic, autoregressive integrated moving averages methods, and triple bottom line property appraisals.[4]	Diversity of these measures means that they are little used for public decision making.

1 "The Economic Case for and Against Prison," London: Matrix Knowledge Group, 2007.
2 See also Mark Moore, *Creating Public Value: Strategic Management in Government*, Cambridge, Mass.: Harvard University Press, 1995.
3 Paul H. Dolan and Robert M. Metcalfe, "The Impact of Subjective Wellbeing on Local Authority Interventions," unpublished manuscript, 2008. The OECD's Beyond GDP program has also collected a huge range of work on the measurement of well-being and societal progress.
4 "Value Maps Literature Survey," Young Foundation and CABE, 2006 (available on youngfoundation.org).

(Mulgan, 2010, p. 41).