







- 1 General overview evaluation resources
- 2 Tools and methods covering one aspect or stage of evaluation
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## Introduction

These pages are intended for Voluntary, Community Faith and Social Enterprise sector organisations to find guidance and tools to help them evaluate social prescribing projects.

You will find resources which explain the purpose and function of evaluation, as well as tools which will guide you through the process and help with practical aspects such as selecting appropriate outcome measures, developing and using theory of change models, and economic evaluation methods.

At the end there is a section containing more specialised or complex resources which may be of interest to commissioners, professional evaluators, academics or those who are looking for a deeper understanding of theoretical, strategic or systems-level perspectives on evaluation.

This is an interactive PDF. To navigate, use the arrow buttons on each page or locate a specific section using the side menu.

Included here are the resources identified in our scoping review with a small number of additional resources added later<sup>1</sup>. Please note many of the resources listed also signpost to other, sometimes extensive resources which have been selected as useful for particular readers.

<sup>1</sup> Supporting the voluntary, community, faith and social enterprise sector to evaluate social prescribing







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- 5 UK Government guidance Useful for reference and may be helpful to some organisations delivering social prescribing activities
- 6 Outcome measures Includes measures for working with particular groups (eg Children and Young People with Learning Disabilities) or issues (eg loneliness) or for areas of work like Green Social Prescribing.

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- 7 Arts and culture Resources which may cover any aspect of evaluation but are specific to or aimed at arts and culture projects and practice
- 8 Green social prescribing Resources for evaluating community green and nature-based programmes
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## 1. General overview evaluation resources

What is Evaluation? How do you do it? Includes resources for both Process and Impact Evaluation. Tools and guidance on the entire process of evaluation

Name Of Resource	Link	Organisation/ Author
Evaluation	Evaluation   NCVO	National Council for Voluntary Organisations
Evaluation Support Scotland Resources	Resources - Evaluation Support Scotland	Evaluation Support Scotland
Introduction to Wellbeing Evaluation	Introduction to wellbeing evaluation - Evaluating wellbeing (whatworkswellbeing.org)	What Works Wellbeing
Better evaluation: Evaluation Methods and Approaches	Evaluation Methods and Approaches   Better Evaluation	Better Evaluation
Evaluation Good Practice Guidance <sup>1</sup>	Evaluation guidance   The National Lottery Heritage Fund	National Lottery
NPC: Starting to measure your impact <sup>2</sup>	Starting to measure your impact - Charity Experts (thinknpc.org)	NCP
UKES Good Practice Guidelines	Good Practice Guidelines - UK Evaluation Society	UK Evaluation Society
Creative and Credible Evaluation <sup>3</sup>	Creative & Credible (creativeandcredible.co.uk)	Creative and Credible
Evaluating new models of care <sup>4</sup>	20170815-evaluation-guide-draft-v1.pdf (ihub.scot)	Healthcare Improvement Scotland

<sup>&</sup>lt;sup>1</sup> Specific to National Lottery funded projects but may be of interest to other users

<sup>&</sup>lt;sup>2</sup> Includes good 10 step guide to Theory of Change. Also cited in https://www.gov.uk/government/organisations/evaluation-task-force/about#aim-and-mission

<sup>&</sup>lt;sup>3</sup> Aimed at arts and health practice, but broad in applicability

<sup>&</sup>lt;sup>4</sup> 2017 - aimed at integrated care providers (Scotland)



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# 1. General overview evaluation resources continued

Name Of Resource	Link	Organisation/ Author
The Complexity Evaluation Toolkit <sup>1</sup>	Toolkit-2021-vJul-2022.pdf (cecan.ac.uk)	Centre for the Evaluation of Complexity Across the Nexus
NHS Evaluation Toolkit <sup>2</sup>	Home - Evaluation Works (nhsevaluationtoolkit.net)	Bristol, North Somerset, South Gloucestershire Integrated Care Board/NIHR ARC West/ West of England Academic Health Science Network
Midlands DSN Guide to Evaluation Design, Principles and Practice <sup>3</sup>	Midlands DSC Guide to Evaluation Design, Principles and Practice (midlandsdecisionsupport.nhs.uk)	West Midlands Decision Support Unit (part of Midlands and Lancashire CSU)
Evaluation: what to consider⁴	Evaluation: what to consider - The Health Foundation	The Health Foundation
Making Sense of Social Prescribing <sup>5</sup>	Making-sense-of-social-prescribing 2017.pdf (socialprescribingnetwork.com)	Polley M et al.
MRC guidelines for process evaluations <sup>6</sup>	ukri.org/wp-content/uploads/2021/11/MRC-291121- PHSRN-ProcessEvaluationSummaryGuidance.pdf	Medical Research Council

<sup>&</sup>lt;sup>1</sup> Includes discussion of 'Evaluability', and Evaluating bids for evaluation work by external evaluators

<sup>&</sup>lt;sup>2</sup> Aimed at providers of healthcare, commissioner-leaning but accessible format

<sup>&</sup>lt;sup>3</sup> Aimed at commissioners but accessible format

<sup>&</sup>lt;sup>4</sup> Focus on 'quality improvement in healthcare'

<sup>&</sup>lt;sup>5</sup> Evaluation is covered in section 8

<sup>6</sup> Covers Process Evaluation only



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# 1. General overview evaluation resources continued

Name Of Resource	Link	Organisation/ Author
Evaluating Improvement <sup>1</sup>	ILG-1.5-Evaluating-Improvement.pdf (england.nhs.uk)	NHS Institute for Innovation and Improvement
Magenta Book <sup>2</sup>	The Magenta Book - GOV.UK (www.gov.uk)	HM Treasury and Evaluation Task Force
I want to evaluate my work <sup>3</sup>	Social Prescribing (culturehealthandwellbeing.org.uk)	Culture Health and Wellbeing Alliance
Evaluation in health and wellbeing	Evaluation in health and wellbeing - GOV.UK (www.gov.uk)	Public Health England
Impact Evaluation Guide	impact_evaluation_guide_0515.pdf (bond.org.uk)	Department for International Development



<sup>&</sup>lt;sup>2</sup> In-depth guide covering all aspects of evaluation, aimed at policy makers but useful to other audiences

<sup>&</sup>lt;sup>3</sup> Contains extensive listings usefully arranged by topic and theme to other websites





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# 2. Tools and methods covering one aspect or stage of evaluation

#### Theory of change/ logic models:

Name Of Resource	Link	Organisation/ Author
Your Guide to Using Logic Models	Your guide to Logic Models.pdf (strategyunitwm.nhs.uk)	NHS Midlands and Lancs Commissioning Support Unit
Defra Theory of Change Toolkit - SD1421	Science Search (defra.gov.uk)	Department for Environment, Food and Rural Affairs
Theory maker <sup>1</sup>	Theory Maker	Theory Maker
Setting Standards for Theory of Change <sup>2</sup>	What is Theory of Change? - Theory of Change Community	Centre for Theory of Change

### Qualitative data, case studies and storytelling

Name Of Resource	Link	Organisation/ Author
A guide to using storytelling to evaluate impact <sup>3</sup>	Storytelling Evaluation Methodology   Old Fire Station, Oxford	Arts at the Old Fire Station
Guide to effective case studies	Guide to effective case studies - What Works Wellbeing	What Works Wellbeing
How to write a learning case study	How to write a learning case study - CultureHive	Centre for Cultural Value
Evaluating Arts, Culture and Health projects pilot evaluation toolkit <sup>4</sup>	Arts, culture and health projects   Birmingham City Council	Birmingham City Council

<sup>&</sup>lt;sup>1</sup> Tool for producing graphic flowcharts for theory of change models

<sup>&</sup>lt;sup>2</sup> Detailed explanation and examples of Theory of Change, also 'publications' page with extensive resources and discussion papers on the use of theory of change, with a focus on international development, but useful in other contexts

<sup>&</sup>lt;sup>3</sup> Participative Evaluation methods - in particular storytelling as evaluation

<sup>&</sup>lt;sup>4</sup> Link to pilot evaluation toolkit excel spreadsheet which may be useful as a way to organise and capture data



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# 2. Tools and methods covering one aspect or stage of evaluation continued

#### Patient and public involvement

Name Of Resource	Link	Organisation/ Author
Guidelines for PPI in Evaluation	Microsoft Word - Guidelines for PPI in Evaluation v5 Feb 2020 (nihr.ac.uk)	NIHR Applied Research Collaboration, West
Guidelines for involving people with mental health issues in heritage projects	Guidelines for involving people with mental health issues in heritage projects (solent.ac.uk)	Burnell et al (Solent/ Winchester/Bournemouth Universities and Historic England)

#### Reporting and dissemination

Name Of Resource	Link	Organisation/ Author
Result! What good impact reporting looks like	Result! What good impact reporting looks like - NPC (thinknpc.org)	NPC
Revised Standards for Quality Improvement Reporting Excellence	SQUIRE   SQUIRE 2.0 Guidelines (squire-statement.org)	SQUIRE
How to create infographics with impact	How to create infographics with impact - CultureHive	Nifty Fox/Centre for Cultural Value

#### Ethics in evaluation

Name Of Resource	Link	Organisation/ Author
Best practice in the ethics and governance of service evaluation: quick guide	Microsoft Word - Ethics in evaluation guidelines leaflet v6 Feb2020 (nihr.ac.uk)	NIHR Applied Research Collaboration, West
Ethics guidelines for internet- mediated research	Ethics guidelines for internet-mediated research   BPS	British Psychological Society



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## 3. Economic evaluation

Tools and guides on economic evaluation methods including Social Value, Social Return on Investment (SROI) and tools specific to wellbeing, arts and cultural projects

Name Of Resource	Link	Organisation/ Author
Developing wellbeing cost effectiveness measures in the charity sector	Developing wellbeing cost effectiveness measures in the charity sector   Pro Bono Economics	ProBono Economics
The guide to SORI	Standards and Guidance - Social Value UK	Social Value UK
UK Social Value Bank <sup>1</sup>	UK Social Value Bank   Demonstrating Social Value   HACT	Housing Associations Charitable Trust
ICECAP tools <sup>2</sup>	ICECAP   Bristol Medical School: Population Health Sciences   University of Bristol	University of Bristol
The Carer Experience Scale	CES   Bristol Medical School: Population Health Sciences   University of Bristol	University of Bristol
A Guide To Health Economics For Those Working in Public Health: A concise desktop handbook	guide-handbook-en.pdf (bangor.ac.uk)	University of Bangor
West Midlands Decision Support Unit Evaluation Guide <sup>3</sup>	Midlands DSC Guide to Evaluation Design, Principles and Practice (midlandsdecisionsupport.nhs.uk)	West Midlands Decision Support Unit (part of Midlands and Lancashire CSU)



<sup>&</sup>lt;sup>1</sup> Social and environmental impact measurement

<sup>&</sup>lt;sup>2</sup> Access to measures of wellbeing for use in economic evaluation

<sup>&</sup>lt;sup>3</sup> Aimed at commissioners



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## 4. NHS and health system resources

Resources developed primarily by or for the NHS (Link workers or others) but may be of significance to other parts of the Social Prescribing landscape

Name Of Resource	Link	Organisation/ Author
Evaluation in health and wellbeing	Evaluation in health and wellbeing - GOV.UK (www.gov.uk)	Public Health England
NHS Evaluation Toolkit	Home - Evaluation Works (nhsevaluationtoolkit.net)	Bristol, North Somerset, South Gloucestershire Integrated Care Board/NIHR ARC West/ West of England Academic Health Science Network
Evaluating Digital Health Products guide	Evaluating digital health products - GOV.UK (www.gov.uk)	Office for Health Improvement and Disparities
Evaluating Improvement	ILG-1.5-Evaluating-Improvement.pdf (england.nhs.uk)	NHS Institute for Innovation and Improvement
Evaluating new models of care	20170815-evaluation-guide-draft-v1.pdf (ihub.scot)	Healthcare Improvement Scotland
MRC guidelines for process evaluations <sup>1</sup>	ukri.org/wp-content/uploads/2021/11/MRC-291121- PHSRN-ProcessEvaluationSummaryGuidance.pdf	Medical Research Council
A Guide To Health Economics For Those Working in Public Health: A concise desktop handbook	guide-handbook-en.pdf (bangor.ac.uk)	University of Bangor
Social Prescribing Learning for Linkworkers: Keeping Records and Measuring Impact <sup>2</sup>	HEE elfh Hub (e-lfh.org.uk)	NHSE E-learning for Healthcare

<sup>&</sup>lt;sup>1</sup> Covers Process Evaluation only

<sup>&</sup>lt;sup>2</sup> Learning Module for Social Prescribing Link Workers



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## 5. UK Government guidance

Useful for reference and may be helpful to some organisations delivering social prescribing activities

Name Of Resource	Link	Organisation/ Author
The Magenta Book	The Magenta Book - GOV.UK (www.gov.uk)	HM Treasury and Evaluation Task Force
Impact Evaluation Guide	<pre>impact_evaluation_guide_0515.pdf (bond.org.uk)</pre>	Department for International Development
Resources for Evaluating Policies in Government <sup>1</sup>	https://www.gov.uk/government/publications/guidance- and-resources-for-evaluating-policy-in-government/ guidance-and-resources-for-evaluating-policy-in- government-html#theory-of-change	Evaluation Taskforce



<sup>&</sup>lt;sup>1</sup> Detailed sections and links to Impact Evaluation, Evaluating health and Wellbeing, Age-friendly evaluation, Theory of Change, Implementation and Process evaluation and more



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## 6. Outcome measures

Includes measures for working with particular groups (eg Children and Young People with Learning Disabilities) or issues (eg loneliness) or for areas of work like Green Social Prescribing. Guidance on the use and selection of outcome measures is also contained in many section 1 resources

Name Of Resource	Link	Organisation/ Author
Thriving Communities Measures Bank	Thriving-Communities-measures-bank.xlsx (live.com)	What Works Wellbeing
UCL Creative Wellbeing Measures Toolkit <sup>1</sup>	<u>Culture Nature Health Research - UCL Wellbeing Measures - University College London</u>	University College, London
Outcomes framework guide <sup>2</sup>	4.2-Outcome-frameworks-and-standalone-measures-database.xlsx (live.com)	National Lottery
Tools to help you gather and use evidence and learning	Tools to help you gather and use evidence and learning   The National Lottery Community Fund (tnlcommunityfund. org.uk)	National Lottery
Outcome and Experience Measures <sup>3</sup>	Outcome & Experience Measures (corc.uk.net)	Child Outcomes Research Consortium
Which tool to use?4	Which tool to use?   Sustain (sustainweb.org)	Sustain
Questionnaires <sup>5</sup>	Questionnaires   Soft outcomes	Impactosaurus
Social Prescribing Learning for Linkworkers: Keeping Records and Measuring Impact <sup>6</sup>	HEE elfh Hub (e-lfh.org.uk)	NHSE E-learning for Healthcare
Developing wellbeing cost effectiveness measures in the charity sector	Developing wellbeing cost effectiveness measures in the charity sector   Pro Bono Economics	ProBono Economics
UK Social Value Bank <sup>7</sup>	UK Social Value Bank   Demonstrating Social Value   HACT	Housing Associations Charitable Trust

<sup>&</sup>lt;sup>1</sup> Wellbeing measures - related to arts and cultural activities

<sup>&</sup>lt;sup>2</sup> National Lottery resource but broad in scope

<sup>&</sup>lt;sup>3</sup> Measures for Children and Young People's mental health and wellbeing

<sup>&</sup>lt;sup>4</sup> Measures for 'green' and nature-based programmes

<sup>&</sup>lt;sup>5</sup> Detailed mental health related measures

<sup>&</sup>lt;sup>6</sup> Learning Module for Social Prescribing Link Workers

<sup>&</sup>lt;sup>7</sup> Social and environmental impact measurement



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## 7. Arts and culture

Resources which may cover any of the above but are specific to or aimed at arts and culture projects and practice

Name Of Resource	Link	Organisation/ Author
A guide to using storytelling to evaluate impact <sup>1</sup>	Storytelling Evaluation Methodology   Old Fire Station, Oxford	Arts at the Old Fire Station
How to write a learning case study	How to write a learning case study - CultureHive	Centre for Cultural Value
Evaluating Arts, Culture and Health projects pilot evaluation toolkit <sup>2</sup>	Arts, culture and health projects   Birmingham City Council	Birmingham City Council
I want to evaluate my work <sup>3</sup>	I want to evaluate my work (culturehealthandwellbeing. org.uk)	Culture Health and Wellbeing Alliance
Look, I'm priceless! Handbook on how to assess your artistic organisation	Look, I'm priceless! Handbook on how to assess your artistic organisation   IETM	International Network for Contemporary Performing Arts
Centre for Cultural Value Research and Evaluation Practice	Research and evaluation practice - CultureHive	University of Leeds
Creative and Credible Evaluation <sup>4</sup>	Creative & Credible (creativeandcredible.co.uk)	Creative and Credible

<sup>&</sup>lt;sup>1</sup> Participative Evaluation methods - in particular storytelling as evaluation

<sup>&</sup>lt;sup>2</sup> Link to pilot evaluation toolkit excel spreadsheet which may be useful as a way to organise and capture data



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## 7. Arts and culture continued

Resources which may cover any of the above but are specific to or aimed at arts and culture projects and practice

Name Of Resource	Link	Organisation/ Author
Guidelines for involving people with mental health issues in heritage projects <sup>1</sup>	Guidelines for involving people with mental health issues in heritage projects (solent.ac.uk)	Burnell et al (Solent/ Winchester/ Bournemouth Universities and Historic England)
How to create infographics with impact	How to create infographics with impact - CultureHive	Nifty Fox/Centre for Cultural Value
UCL Creative Wellbeing Measures Toolkit	<u>Culture Nature Health Research - UCL Wellbeing Measures - University College London</u>	University College, London



<sup>&</sup>lt;sup>1</sup> Specific to Heritage projects



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## 8. Green social prescribing

Resources for evaluating community green and nature-based programmes

Name Of Resource	Link	Organisation/ Author
Which Tool to Use?1	Which tool to use?   Sustain (sustainweb.org)	Sustain
Green Social Prescribing Toolkit <sup>2</sup>	nhs-green-social-prescribing-toolkit.pdf (socialprescribingacademy.org.uk)	NHS - produced in partnership with the National Academy of Social Prescribing and the 7 Green Social Prescribing Test and Learn sites
Defra Theory of Change Toolkit - SD1421	Science Search (defra.gov.uk)	Department for Environment, Food and Rural Affairs



<sup>&</sup>lt;sup>1</sup> A downloadable guide to tools for evaluating health and wellbeing outcomes for community green and nature-based programmes

<sup>&</sup>lt;sup>2</sup> The purpose of the toolkit is to offer a 'how to' guide for those people who have responsibility for, or a role in, starting, developing, or growing green social prescribing schemes



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## 9. Academic or system-level resources

Of interest to those looking for a more in-depth look at evaluation in systems, from a theoretical, system-wide or research perspective

Name Of Resource	Link	Organisation/ Author
A guide to wellbeing economic evaluation	A Guide to Wellbeing Economic Evaluation - What Works Wellbeing	What Works Wellbeing
Evidence informed guidance for robust evaluation and evidence synthesis <sup>1</sup>	Progressing social prescribing with a focus on process of connection: Evidence-informed guidance for robust evaluation and evidence synthesis - ScienceDirect	Cunningham et al
West Midlands Decision Support Unit Evaluation Guide <sup>2</sup>	Midlands DSC Guide to Evaluation Design, Principles and Practice (midlandsdecisionsupport.nhs.uk)	West Midlands Decision Support Unit (part of Midlands and Lancashire CSU)
Setting Standards for Theory of Change	Publications - Theory of Change	Centre for Theory of Change
Using Logic Models in Evaluation <sup>3</sup>	Using Logic Models in Evaluation- Jul16.pdf (strategyunitwm.nhs.uk)	NHS Midlands and Lancs Commissioning Support Unit
The Complexity Evaluation Toolkit	Toolkit-2021-vJul-2022.pdf (cecan.ac.uk)	Centre for the Evaluation of Complexity Across the Nexus
NHS Evaluation Toolkit	Home - Evaluation Works (nhsevaluationtoolkit.net)	Bristol, North Somerset, South Gloucestershire Integrated Care Board/NIHR ARC West/ West of England Academic Health Science Network
Evaluation: what to consider⁴	Evaluation: what to consider - The Health Foundation	The Health Foundation

<sup>&</sup>lt;sup>1</sup> Related to 'connection' aspect of social prescribing

<sup>&</sup>lt;sup>2</sup> Aimed at commissioners

<sup>&</sup>lt;sup>3</sup> Aimed at commissioners

<sup>&</sup>lt;sup>4</sup> Focus on 'quality improvement in healthcare'



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## 9. Academic or system-level resources continued

Of interest to those looking for a more in-depth look at evaluation in systems, from a theoretical, system-wide or research perspective

Name Of Resource	Link	Organisation/ Author
West Midlands Decision Support Unit Evaluation Guide	Midlands DSC Guide to Evaluation Design, Principles and Practice (midlandsdecisionsupport.nhs.uk)	West Midlands Decision Support Unit (part of Midlands and Lancashire CSU)
MRC guidelines for process evaluations <sup>1</sup>	ukri.org/wp-content/uploads/2021/11/MRC-291121- PHSRN-ProcessEvaluationSummaryGuidance.pdf	Medical Research Council
Evaluating Improvement	ILG-1.5-Evaluating-Improvement.pdf (england.nhs.uk)	NHS Institute for Innovation and Improvement
Magenta Book	The Magenta Book - GOV.UK (www.gov.uk)	HM Treasury and Evaluation Task Force
Your Guide to Using Logic Models	Your guide to Logic Models.pdf (strategyunitwm.nhs.uk)	NHS Midlands and Lancs Commissioning Support Unit
Defra Theory of Change Toolkit - SD1421	Science Search (defra.gov.uk)	Department for Environment, Food and Rural Affairs
Revised Standards for Quality Improvement Reporting Excellence	SQUIRE   SQUIRE 2.0 Guidelines (squire-statement.org)	SQUIRE
ICECAP tools <sup>2</sup>	ICECAP   Bristol Medical School: Population Health Sciences   University of Bristol	University of Bristol

<sup>&</sup>lt;sup>1</sup> Covers Process Evaluation only

<sup>&</sup>lt;sup>2</sup> Access to measures of wellbeing for use in economic evaluation



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## 9. Academic or system-level resources continued

Of interest to those looking for a more in-depth exploration of evaluation from a theoretical, system-wide or research perspective

Name Of Resource	Link	Organisation/ Author
The Carer Experience Scale	CES   Bristol Medical School: Population Health Sciences   University of Bristol	University of Bristol
A Guide To Health Economics For Those Working in Public Health: A concise desktop handbook	guide-handbook-en.pdf (bangor.ac.uk)	University of Bangor
NHS Evaluation Toolkit	Home - Evaluation Works (nhsevaluationtoolkit.net)	Bristol, North Somerset, South Gloucestershire Integrated Care Board/NIHR ARC West/ West of England Academic Health Science Network
Best practice in the ethics and governance of service evaluation: quick guide	Microsoft Word - Ethics in evaluation guidelines leaflet v6 Feb2020 (nihr.ac.uk)	NIHR Applied Research Collaboration, West
Evaluating Improvement	ILG-1.5-Evaluating-Improvement.pdf (england.nhs.uk)	NHS Institute for Innovation and Improvement

