

# **PLANNING & EVALUATION METHODOLOGY HANDBOOK**

## **Planning, Evaluating and Reviewing Youth Work Engagement**

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## ACKNOWLEDGEMENTS

## **INTRODUCTION**

### **❖ The aim of this handbook**

To provide youth practitioners with a handbook for guidance and resources which outlines the importance of planning, monitoring, reviewing and evaluating in everyday youth work practice.

### **❖ How this handbook works**

This handbook has been designed to be used by youth practitioners to support their day-to-day work with young people.

## ❖ OVERVIEW

**Quality services for young people do not just happen. They rely on skilled confident youth workers, sufficient resources, and decision making processes built around young people. Youth Workers need to be able to manage themselves and others, access and co-ordinate resources including time and surrounding circumstances to reach a specific goal.**

**The first stage is 'planning'**

**Workers need to plan their work with young people in order to:**

- Accurately estimate the time and effort required to complete a project or programme
- Identify and organise systems and required resources
- Organise personal time to carry out responsibilities
- Maintain adequate preparation time for activities
- **Develop schedules and timetables with clear, specific milestones and deadlines**
- Establish how to measure results and milestones

**They need to 'prioritise'**

- Identify critical tasks
- Arrange tasks in a logical order
- Establish priorities systematically, differentiating between urgent, important and unimportant tasks
- Use a 'to do' list, task plan, or similar planning devices to note action plans, deadlines etc.
- Monitor and adjust priorities and eliminate tasks on an on-going basis

## ❖ YOUTH WORK CURRICULUM STATEMENT FOR WALES

The Youth Work Curriculum Statement for Wales (2007) sets out the overall strategy for youth services and is based on four underpinning pillars: educative, expressive, participative and empowering. These principles are used as a guide for planning and implementing participative activities with intended positive outcomes for young people. Youth work through its voluntary relationship with young people should offer opportunities for learning that are:

<b>Educative</b>	<b>Enabling</b> young people to gain skills, knowledge, understanding, attitudes and values needed to identify, advocate and pursue their rights and responsibilities as individuals and as members of groups and communities locally, nationally and internationally.
<b>Expressive</b>	<b>Encouraging</b> and <b>enabling</b> young people to <b>express</b> their emotions and <b>aspirations</b> through creative, sporting and challenging opportunities which raise an awareness of: <ul style="list-style-type: none"> <li>• Cultural identity</li> <li>• Bilingualism and the value of one's own language</li> <li>• Heritage</li> <li>• Respect for diversity</li> <li>• Citizenship and respect for others</li> </ul>
<b>Participative</b>	Where young people are <b>encouraged</b> to share <b>responsibility</b> and to become <b>equal partners</b> , fundamental to the learning processes and decision making structures which affect their own and other people's lives and environments.
<b>Empowering</b>	<b>Encouraging</b> and <b>enabling</b> young people to understand their rights and responsibilities to enable them to act on personal, social and political issues which affect their lives and the lives of others as responsible citizens of the communities of which they are a part.

The Curriculum is delivered in a wide range of settings, using a number of diverse activities involving young people in:

- Informal and structured educational programmes which enhance their personal development
- Places and relationships within which they can enjoy themselves, feel secure, supported and valued
- Discussing issues relating to health, relationships, behaviour, and responsibilities
- Becoming sensitive to their community, local and global environments, culture and heritage
- Finding challenge, recognition and achievement through adventurous activities
- Receiving information and advice through the availability of published material, guidance, counselling and group discussion
- Developing skills through individual or team sports and taking part in informal recreational activities in a safe environment
- Developing expressive skills through participation in dance, music, visual arts, drama and role-play
- Travelling, experiencing residential opportunities and international exchanges

## **SECTION B**

### **QUALITY STANDARDS AND GOOD YOUTH WORK PRACTICE**

#### **❖ What is good youth work practice?**

Managing a well thought out and established system when it comes to planning, monitoring and evaluation is essential for an organisation to be able to implement high standards, co-ordinate a thorough staff training and induction process, analyse and evaluate their own work against their own standards and core values.

**Your own system does not have to be huge or complicated but if you do not know exactly what you set out to do, how do you know you have completed it or done it well?**

Quality standards will differ slightly from organisation to organisation but there are some core elements that should be incorporated into every organisation's policies and procedures that constitute 'best practice'.

With reference to planning, monitoring and evaluation these would include:

- Evidence of need
- Established aims and objectives or learning outcomes
- The involvement of young people in long and short term planning



- Forms and procedures for recording session attendance and personal data
- A balance of recording and monitoring both qualitative and quantitative information
- Interim progress evaluation or regular reporting systems
- Regular staff review and debrief procedures
- Evaluation procedures for young people, staff and other stakeholders at the end of the session or project
- Staff training and induction around the importance of planning and evaluation plus operational issues regarding organisational procedure

**All of these procedures also need to comply with your organisation's other policies including health and safety, equality and diversity, child protection and data protection.**

## ❖ National Occupational Standards for Youth Work

**“The National Occupational Standards define what each sector agrees to be good practice. They define the competence required by youth workers and can be used to develop and monitor these skills in key individuals.”<sup>1</sup>**

All standards promote the Key Purpose of Youth Work which is to work with young people to facilitate their personal, social and educational development and enable them to gain a voice, influence and place in society in a period of their transition from dependence to independence.

**The standards are designed to reflect the key aspects of Youth Work and they are broken down into 6 distinct parts:**

<b>A</b>	<b>Build relationships with young people which enable them to explore and make sense of their experiences and to plan and take action.</b>
<b>B</b>	<b>Facilitate young people’s learning and their personal and social development.</b>
<b>C</b>	<b>Enable young people to organise and take co-responsibility for activities, events and projects.</b>
<b>D</b>	<b>Work with young people in accordance with the core values of youth work.</b>
<b>E</b>	<b>Plan, manage and develop Youth Work.</b>
<b>F</b>	<b>Support and develop effective, efficient and ethical practice in Youth Work.</b>

**Good planning, monitoring and evaluating skills are at the core of many of the standards shown above and are therefore essential for teams and individuals in order to operate at the basic standard.**

***Good or best practice means going the extra mile, not just what is standard or expected.***

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What can the National Occupational Standards do for you? PAULO/Lifelong Learning UK – ENT094/01/0305

# PLANNING

## The Planning-Evaluation Cycle

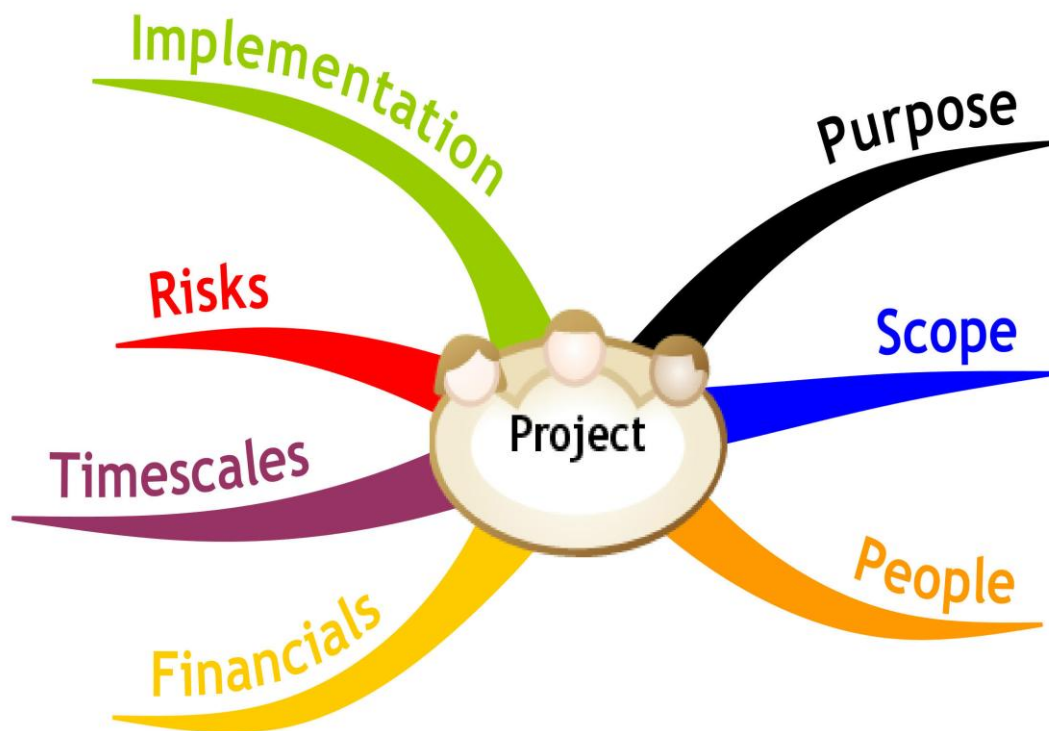
The distinctions between planning and evaluation are not always clear; this cycle is described in many different ways with various phases claimed by both planners and evaluators. Usually, the first stage of such a cycle, the planning phase, is designed to elaborate a set of potential actions, programs or projects and select the best for implementation. Depending on the young people involved, the planning process could involve any or all of these stages:

- ⤴ Identifying the ideas, issues, or concerns
- ⤴ Detailing the 'how' young people want to address them and the programme or project ideas
- ⤴ The evaluation of the alternatives and the selection of the best one
- ⤴ The implementation of their selected alternative

Although these stages are traditionally considered planning, there is a lot of evaluation work involved.

The evaluation phase also involves a sequence of stages that typically includes:

- ⤴ The formulation of the major objectives, goals and project aims
- ⤴ Identify the major components of the evaluation, namely the programme, participants, setting, and measures
- ⤴ The design of the evaluation and detailing how this will be carried out.
- ⤴ Finally, the analysis of information, both qualitative and quantitative and deciding how to use the evaluation results



Planning is a process for getting ideas into action. If you are systematic about the process, action can be made easier and more effective. The approach can be time consuming at first but since your action will be more effective, you will save time in the long run.

A systematic approach gives you a method by which you can:

- Check that what you want to do is worth doing
- Find out which things are feasible
- Arrange things properly
- Use resources efficiently
- Learn from both success and failure

# EXTENDING ENTITLEMENT

Extending Entitlement<sup>2</sup> is the Welsh Assembly Government's flagship policy for youth support services in Wales. It includes all services, support and opportunities for young people between 11 and 25, wherever they happen, whoever is delivering them and wherever the funding originates.

It is important for youth work practitioners to consider how their work relates to Extending Entitlement by building aspects of ten entitlements into their planning where appropriate. 'The Ten Entitlements' are:

1. Education, training and work experience tailored to young people's needs.
2. Basic skills which open doors to a full life and the promotion of social inclusion.
3. A wide and varied range of opportunities to participate in volunteering and active citizenship.
4. High quality, responsive and accessible services and facilities.
5. Independent, specialist careers advice and guidance, student support and counselling services.
6. Personal support and advice where and when needed and in appropriate formats with clear ground rules on confidentiality.
7. Advice on health, housing benefits and other issues provided in accessible and welcoming settings.
8. Recreational and social opportunities in a safe and accessible environment.
9. Sporting, artistic, musical and outdoor experiences to develop talents, broaden horizons and promote rounded perspectives, including both national and international contexts.
10. The right to be consulted, to participate in decision making and to be heard on all matters which concern them or have an impact on their lives.

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<sup>2</sup> Extending Entitlement,  
<http://wales.gov.uk/topics/childrenyoungpeople/participation/extendingentitlement1>

## **NAOMIE – the good practice framework for planning, monitoring and evaluation**

The **NAOMIE** loop training model is just one of a number that may be used when undertaking any form of planned activity.

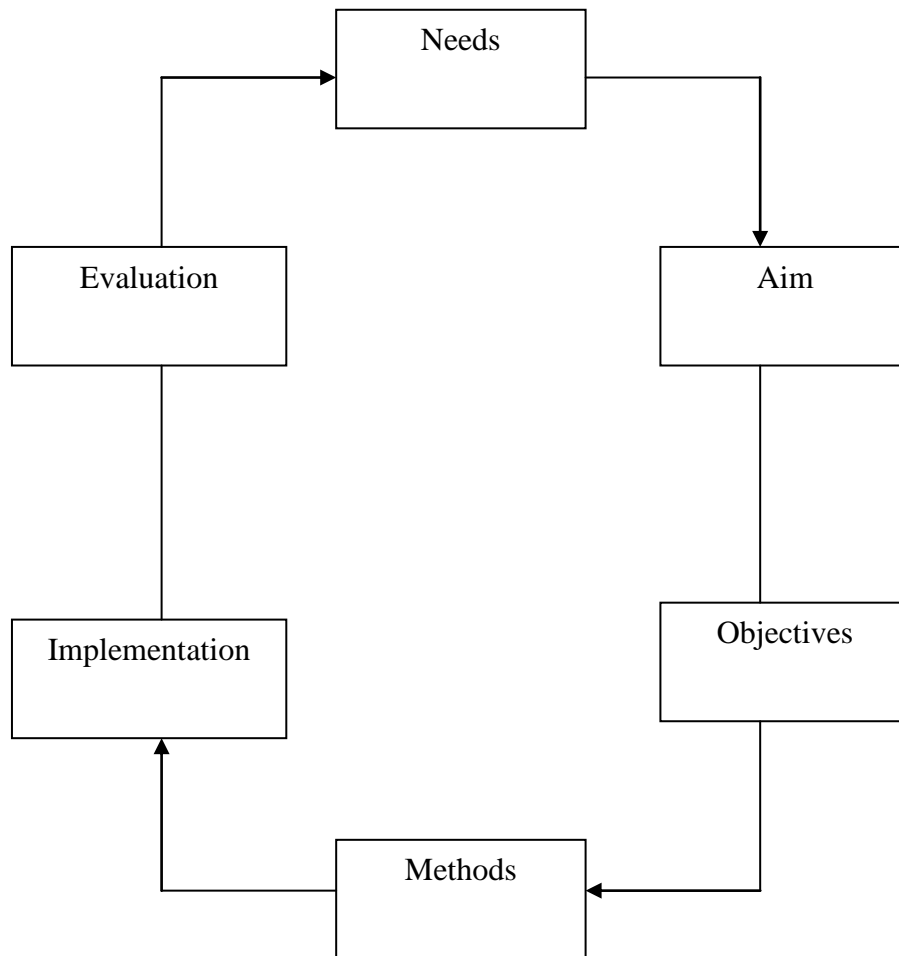
The use of this type of training model should be regarded as an aid to programming and not be regarded as a constraint to planning an activity.

This method of programme planning may be used for various types of activities and participation such as pool matches, inter-club events, residential training or outdoor pursuits.

NAOMIE is a good practice model for planning, monitoring and evaluating youth work. It incorporates every stage a project needs to go through and breaks down the planning phase into smaller chunks:

This planning guide (**NAOMIE**) will help you become more effective as a youth worker. It will help you question activities before you begin. It will make planning easier and more logical. It makes you think about being more time effective and help improve on past performances.

What follows is a representation of NAOMIE as a systematic planning cycle. The model shows how one stage follows from the other with Needs taken as a starting point. In reality, whilst you will have all elements of such a cycle represented in the way that you work, they may not follow this idealised pattern. Some parts of the cycle may be given more attention than others, and evaluation (including monitoring and review) may be left out altogether.



## Tools for Planning an Activity or Project

	<b>Actions</b>	<b>Example</b>
<b>Needs</b>	Determine the need for the activity – why are you planning this activity?	Lack of meaningful youth participation within the project.
<b>Aims</b>	Once you have established the need for an activity you can decide what the general aim of that activity will be. An aim is a long term statement of intent. They are imprecise, often ambiguous, give a general direction without time limit and are often written from the point of view of a professional, ie. you as the worker and what you intend to achieve with the activity.	To Increase levels of participation of young people in the day-to-day running of the youth project.
<b>Objectives</b>	Whilst your aim illustrates what you, as the youth worker, intend the activity to be, objectives describe what the young people will be able to do, or know, or value if the learning takes place, ie. objectives define a desired change of behaviour - the learning outcomes.	<ul style="list-style-type: none"> <li>• Identify and source resources</li> <li>• Consult with other young people on any current issues within the project</li> <li>• Consult with the Management Committee on any current issues within the project</li> <li>• Plan projects to increase levels of participation of other young people</li> </ul>
<b>Method</b>	You need to decide which methods you are going to use in order to achieve your objectives. For example, are you going to show the young people a video or are you going to demonstrate the activity yourself, or are the young people going to learn by having a go themselves?	Agree an agenda and demonstrate to young people how they can participate in the day-to-day running of the project. Open discussions for getting their views and voices heard.
<b>Implementation</b>	Once you have chosen the methods you are going to use then you need to decide how you will deliver the activity. This implementation plan will include resources, (both human and material), timing, bookings that need to be made, ie. for a room or minibus, advertising the activity.	Flipcharts, Mindmaps, colourful pens, games and quizzes, welcoming room, safe place. Funding for bus fares, rewards, resources. Monitor the amount of young people participating. Advertise on Social Network, Information Board, word of mouth.
<b>Evaluation</b>	The Evaluation of the planned activity is as important as the activity itself. Critical analysis allows the activity to be improved in the future and also highlights reasons why an activity did not go as well as planned.	Notes of meetings, Evaluation sheets outlining what was good, what needs to be improved? Inform young people how you are going to feedback any issues, decisions etc, to them.



From the very last point you will see that new needs can be identified so the planning process begins again.

### 1 What is the **NEED**?

There is a need to improve the involvement of young people in this group.

2 What do I **AIM** to do about this? Establish an effective way of engaging young people consistently to ensure they are involved in all developments.

3 What specific **OBJECTIVES** can I set?

- By the end of the first month each member will be asked their opinions about the organisation and what they would like to see in the future and how they would like to be involved.
- In the 2<sup>nd</sup> and 3<sup>rd</sup> month a selection of identified activities will be piloted to see if members are interested in long term programmes/projects
- By month 4<sup>th</sup> members will have decided how take part and be effective linking with other staff, volunteers, management committees etc

4 What is the best **METHOD** to achieve the desired results?

5 How do I **IMPLEMENT** the plan?

6 How do I **EVALUATE** the plan?

- Have I met my objectives?
- Ask the members to review the activities after they have taken part.
- What went well?
- What difficulties occurred?
- What should we do in the future?
- List the linking activities and check the frequency and type of activity.
- Discuss with members their perception, knowledge, and understanding of the plan .
- List the success of the involvement of young people.

## Good Planning Checklist

1. Have we Identified and prioritised the important activities and milestones?
2. Have we assessed risk and thought about alternatives and contingency plans if circumstances change?
3. Have we defined, clarified and assigned roles and responsibilities?
4. Does everyone involved know what their task or responsibility involves, and can carry it out?
5. Does everyone have a workload that is manageable and fair, as well as being challenging?
6. Have we agreed a budget and costed all activities and will we achieve results within the budget?
7. Have we also planned how we are going to monitor and evaluate?

1. What is the **NEED** of members? of the group? of the leaders? Why?

2. What do I **AIM** to do about this?

- What do I want to do? Why?
- Where do I want to go? Why?

3. What specific **OBJECTIVES** can be set?

- What will others be able to do as a result?
- How will effectiveness be measured?
- What exactly will be the end result?
- When must the plan be completed?
- What will be the criteria for success?

4. What is the best **METHOD** to achieve the desired results?

- What activity should I use?
- How shall I group the members or Leaders:
- groups, pairs, individually?
- What resources do I need?
- What is my time plan?

5 How do I **IMPLEMENT** the plan?

**Do it!**

6. How do I **EVALUATE** the plan?

- Did I meet my objectives?
- What went well?
- What difficulties occurred?
- What could be learned for the future?
- What new needs exist?

## **Establishing Needs<sup>3</sup>**

The first stage is to establish the NEEDS to be addressed. Some would object to this term, when it is used with reference to the needs of users, participants or clients, on the basis that it has paternalistic overtones. The implication is that if professionals determine these needs they are acting in a “superior” manner on the basis of their power over the people they serve. One aspect of the criticism is that it is simply unethical for one person to do this to another. It can also be said that the implied relationship between the worker and the participant is inappropriate in community education settings, when the aim is to work in an empowering way on the basis of a commitment to equality. A further criticism is that a focus on needs leads to a victim blaming approach to problems that often have their origins in the flawed social structure. An alternative view lays stress on the fact that people have rights that are in some way being infringed. The focus is then on deficits in the social structure rather than alleged weaknesses in the capacity of the participants, or the community of which they are members, to provide adequately for themselves. These are important points and should make us cautious about the uncritical use of certain terms. We may still use NEEDS but perhaps in the more straightforward sense of what needs to be done. The implication here is that the worker has to survey the situation in order to identify the issues to be addressed. This can, and should, be done in conjunction with participants. Of course there are also areas of work that do not involve contact with users or participants. The stages outlined here apply equally to such non-contact areas but we shall concentrate on those aspects of work that involve contact with those served.

***What is the NEED of young people? Of the group? Of the Youth Workers?  
Why?***

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<sup>3</sup> **The Moray House School of Education  
at the University of Edinburgh**

## **Relating Needs to Aims**

Work takes place within a general set of AIMS. An aim is a general goal in response to the identified issues. If the issue is around, for example, poor housing or lack of facilities, or vandalism or unemployment, then the aim is to turn around or eradicate the conditions that have caused these problems. The connection might not be so straightforward, however, as the aim is not a simple opposite to the identified situation. Whilst one might seek to stop vandalism by young people in a local community, for instance, the aim might be to reflect a more complex desire to stop vandalism by providing productive activities for the perpetrators. Discussions about aims are useful for forcing the issue about what exactly is meant and what are the underpinning assumptions about causes. Aims, therefore, can reflect underlying ideological commitments and theoretical positions. Assuming that vandalism is simply the result of malicious behaviour will lead to one set of remedies, whilst explanations that point to structural deficits, such as unemployment, might lead to another set of responses. If we take the latter, the aim might be expressed in terms of:

Reducing the incidence of vandalism in the area by tackling its root causes.

Having thought it through it is useful to split a general aim into a number of strategic objectives. With respect to the above aim, strategic objectives might include something like the following:

- Involving all sections of the community in serious consideration of the issues.
- Enabling the voice of young people to be heard by local, and other, power brokers.
- Countering the negative view of young people in the area.
- Raising awareness of lack of facilities

Strategic objectives are an expression of priorities for the work. They direct attention to certain intentions and in so doing screen out others. It is important to realise that there are choices to be made, and making these choices forces careful discussion of the reasons for and against. In turn, strategic objectives need to be translated into more detailed objectives if they are to be realised in practice.

## **Determining and Setting Objectives**

Setting detailed OBJECTIVES is about breaking the broad intentions of strategy into concrete steps. Doing so appears to be self-evidently useful but some caution must be exercised. There are questions about how many and how detailed objectives need to be. The argument is that an over abundance of objectives with an excessive amount of detail could be too complicated and cumbersome to realise in practice situations that are, in many cases, characterised by uncertainty and fluidity. One can plan a series of meetings with the “vandals” but they may not turn up. The fact that much of our work is contingent upon other factors, not least the unpredictability of some of the people that we serve, is not a reason to abandon setting objectives. These must be sufficient to point the way forward but be amenable to change and development given altered circumstances. A useful conceptual tool for translating broad aims into objectives is to adopt the 5WH approach. This involves providing answers to the following questions:

- Why must something be done?
- What is to be done and achieved?
- Where is it to be done?
- Who is involved and in what way?
- When is it to be done and over what period?
- How is it to be done?

Answering the above questions can make the process of evaluation (see below) easier and more focussed, since it is easier to see what has been achieved when the objectives have been set clearly. Answering the questions also enables the practitioner to move on to the next stage in the planning process.

***Apply the 5WH formula to one of your objectives.***

## **Selecting Methods**

What is going to be the best youth work process or delivery method to enable you to achieve what you need to with young people?

The means by which action is taken can be included under the heading of METHODS. This is more than a simple catalogue of techniques. Method implies an over-arching approach to working with people within which techniques, tools and skills can be deployed. Street theatre, community arts, outdoor pursuits, cultural action, research, social action and detached youth work, are all examples of methods. Working with groups may be a feature common to all of them but when there is a commitment to a particular approach, this too is a method. Choice of method is dependent on purpose. The next stage follows from choice of method.

***What method or methods do you use in your work? What are the justifications for working in this way?***

## **Implementing Plans**

IMPLEMENTATION has two references. Firstly it refers to the act of carrying out the plan. It is the action phase when intentions and commitments are realised in concrete attempts to influence the identified situation or address the specified issues. When working with two or more colleagues it is important to assign responsibility for particular actions to individuals. This way everyone is clear about who has undertaken to do what and by when. Care has to be taken to ensure that the workload is spread sensibly and equally. Resentment can arise when one has a greater burden than another for no apparent reason. The second reference is to the means by which implementation will be supported. It is important to pin down resource issues at the start. What money, equipment, time, materials and so on will be required to achieve the objectives? Careful thought about resources can ensure that action is properly supported. At the same time, consideration about actual resources available can make practitioners realise that their plans are unrealistic. This may mean going back to the objectives phase to think again about what is achievable. It may also mean that resources have to be obtained and this requirement can be built into the strategic or the detailed objectives. Another useful acronym to assist in this process of implementation is the notion of being SMART. It means ensuring that objectives are:

- Specific
- Measurable
- Achievable
- Resourced
- Timed

***State your responsibilities (these should be reflected in your job description). To what extent do your key tasks reflect the strategic objectives of the agency/organisation? Apply the SMART formula to one of your key tasks.***



## Evaluating the work (Monitoring)

The final phase in this model involves EVALUATION. Evaluation is the process by which results are checked against intentions. It literally means ascribing value to what has been done and achieved. At its simplest it involves answering apparently straightforward questions such as:

- Did we achieve what we set out to achieve?
- What parts have we succeeded in and where have we failed?
- What did we do well and what did we do badly?

As part of a learning and development cycle – evaluation or reviewing is crucial to **good youth work practice**.

1. It should be done with young people throughout sessions and programmes as part of the monitoring process. By getting feedback the session or programme can be altered straight away to make it more fun/appropriate/effective.....
2. This doesn't have to take too long or be substantial – it can be fun or activity based.
3. Evaluation should also take place at the end of a session or programme:
  - A. **With young people** - it is an opportunity to seek their feedback. They have been on the receiving end and may have a lot of insightful things to contribute.

It is also a good opportunity to consolidate learning outcomes with young people and work with them to process their distance travelled.

- B. **With workers** – colleagues need to make time for regular opportunities to assess whether objectives have been met, discuss working relationships and operational issues.

One designated worker should also take responsibility for collating the final project evaluation. It may take the form of a report to stakeholders or presentation to a manager for example.

***Did we meet the objectives? What went well? What difficulties occurred? What could be learned for the future? What new needs exist?***

What makes a good youth work session?

***Progressive sessions linked to each other and the curriculum with ideas and activities which flow neatly from one subject into another. Plans which provides structure but also allow for flexibility. Sessions and projects which meet the needs of young people and interest and engage them.***

- Building relationships is at the core of youth work. How do you plan for responsive interaction and spontaneous discussion?
- Understanding progression. Become familiar with Resourcing Excellent Youth Service (REYS) outcomes:
  - A – Contact
  - B – Participation
  - C – Recorded Outcomes
  - D – Accredited outcomes

• You can find a detailed breakdown and explanation of these outcomes in 'Recording Young People's Progress and Accreditation in Youth Work' (NYA 2005) on [www.nya.org.uk](http://www.nya.org.uk)

- Making it fun and participative. Young people often vote with their feet and youth work needs to involve and interest them in order to engage and retain them.

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