

**MEASURING UP FOR MEDIUM  
ORGANISATIONS**  
GUIDANCE

**INSPIRING  
IMPACT**

**NCVO**  
CHAMPIONING  
VOLUNTARY  
ACTION

This guidance is designed to help you to get the most out of self-assessment, by helping you to explore and understand the Measuring Up criteria, score your practice accurately, and apply the tool effectively to your particular context.

The guidance sets out:

- **A short explanation of each criteria**
- **Information about why each criteria is important for impact measurement**
- **A description of what your practice would have to look like in order to meet the criteria in full**

The guidance also includes links to useful resources to help you develop your practice, as well as tips for how to improve your practice if you already meet the criteria in full.

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## 1. Plan

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Careful, realistic planning lays the foundation for good impact practice. Accordingly, 'Plan' is the longest section of Measuring Up, and the questions this section asks you to consider are relevant to all organisations, whatever their size, shape or ambition in terms of being able to plan, evidence, understand, communicate and learn from their impact.

Planning requires you to reflect on how and why you think your work can make a difference. It is also an excellent first step for involving others in thinking about your impact – everyone can get involved in discussing and defining your organisation's purpose, outcomes and impact.

Your goals for impact measurement will also determine the depth and detail of information that you set out to collect, as well as your plans for collecting it. Organisations that need information to remain accountable to funders and commissioners and to learn more about how to improve their work will require good quality evidence. However, the standard of evidence required for organisations who want to influence policy or to explore the efficacy of a new type of programme or initiative will be much higher. We have explored this issue of proportionality throughout the guidance provided with this section.

### 1.1. We use local information to provide evidence of the need for our work

A needs assessment sets the scene for the work you do. It will identify the extent and seriousness of existing problems, any services currently available and the needs that are not being met. Once you have clarified the need for your organisation, you can start defining how you plan to make a difference, laying the foundations for good impact practice.

If your organisation has been running for some time, the chances are that you will have conducted a needs assessment in the past. If you are a new organisation, however, you will have to begin from scratch.

To begin with, look for local data and any relevant national statistics and reports to get information on:

- The area or region your organisation will operate in
- The state of current service provision
- The type of person you want to help, and where they are
- The sort of problems they face, and possible solutions.

#### **This criterion is fully met if:**

You can describe the need for your organisation, and evidence that need using available information.

**What next?**

If you've met this criterion in full, you could improve your practice by:

- Collecting your own information to use alongside existing data

Collecting your own information will add depth to your needs assessment and could make it more relevant to your specific context. You could gather this information by speaking to current service users, potential service users, community groups, and other organisations delivering similar work.

- working proactively to target 'harder to reach' groups

Harder to reach groups may be the very people you want to work with, and so it is important that you consider how to include their views in your needs assessment. You may need to think through people's accessibility requirements, or provide translation services.

**1.2. We can describe who will benefit from our work**

Being able to describe your target group – the main group or groups in society that you work with - is an important step in defining your purpose as an organisation. This means that it's also an important step in focusing on your impact.

Your target group could be identified by geographical area, age, gender, sexual orientation, ethnicity, or by health status or disability. You may also want to identify socio-economic groups, such as single parents, children excluded from school or homeless people.

You can use the information gathered through your needs assessment to help you to define your target group or groups.

**This criterion is fully met if:**

You can describe in detail the group or groups that will benefit from your work.

**What next?**

If you've met this criterion in full, you can improve your practice by:

- Describing different sub-groups within your target group

Unpicking the different groups hidden within your target group will give you a more detailed picture of the different types of people who might benefit from your work.

- Separating out end, first-line, and indirect beneficiaries of your work

Your end beneficiaries are the groups who directly benefit from your work.

Your first-line users are the people who access your services directly, but may not be your actual target group – for example, if your organisation ran parenting workshops to reduce childhood obesity, your first-line users would be parents or carers, but your end beneficiaries would be the children themselves.

Other groups might benefit indirectly from your work, for example other agencies which refer people to you. Breaking down your target group in this way will help you to build up a fuller picture of the types of people who might benefit from your work.

### **1.3. We have a clear mission statement, setting out our purpose and values.**

Your mission statement outlines your organisation's overall purpose, as well as the core values underpinning your work. Setting out the overall purpose of your organisation will help you to define the biggest, most broad-reaching change that you would like to see as a result of your work. This is also known as your **impact** - the broad or longer-term effects of your project or organisation's work. This can include effects on people who are direct users of a project or organisation's work, effects on those who are not direct users, or effects on a wider field such as government policy.

Defining your organisation's overall purpose and the changes that you would like to create begins the discussion about how you will measure the difference your work makes. Involving staff, volunteers, trustees, partners and beneficiaries at this stage will add depth and detail to your planning processes, and will help people to feel involved and engaged.

#### **This criterion is fully met if:**

Your organisation is guided by a document which clearly sets out your overall purpose as an organisation, and the core values that underpin your work.

#### **What next?**

If you've met this criterion in full, you can improve your practice by:

- Making sure that your mission statement and core values are agreed on and recognised by the whole organisation

Involving people in putting your mission statement together, and making sure that the end document is recognisable to everyone within your organisation (including staff, trustees, and volunteers) will make it a more powerful guiding document.

- Making sure that your mission statement and core values are written into all of your key documents, and that people are clear about how they influence your day-to-day work

Writing your core values and purpose into your key documents will help to embed your mission statement into the way you think about and approach your work. This will help to

make sure that your values and ethos are put into practice, bringing your mission statement to life.

#### **1.4. We can describe the positive outcomes that we want to achieve for beneficiaries.**

Your **outcomes** are the changes, benefits, learning or other effects that happen as a result of the work you deliver. Your work as an organisation will potentially produce any number of outcomes for different groups, both positive and negative, planned or unexpected.

Outcomes are not the same as **outputs**, which refer to the activities, services and products provided by an organisation. Your outcomes describe the difference that your work makes, and not the work itself.

For example:

A youth group runs sexual health workshops with local young people. The output is the workshop – the service that they deliver. The outcome is what changes for the young people as a result of participating – an increased understanding of how to protect themselves from sexually transmitted diseases.

#### **This criterion is fully met if:**

You have clearly defined positive outcomes that you hope to achieve for different groups.

#### **What next?**

If you've met this criterion in full, you can improve your practice by:

- Describing the order in which outcomes happen for beneficiaries

Once you have defined your outcomes for beneficiaries, you may decide to map out your **intermediate outcomes** - the small changes that occur for beneficiaries in the lead up to a bigger change or an **end outcome**. For example, an organisation working to support people using alcohol might have abstinence from alcohol as an end outcome, with reducing the amount of alcohol consumed, and increasing the length of time without drinking as intermediate outcomes. Mapping your intermediate outcomes in this way will help you to develop a clearer description of the order in which changes happen for beneficiaries.

- Developing your outcomes in consultation with potential beneficiaries

Consulting with potential beneficiaries, where possible, will help you to develop an in-depth picture of the sort of outcomes that could result from your work, and how beneficiaries might describe and experience these changes. This will help you to define outcomes that are relevant to your beneficiaries and realistic, given the work you do.

## 1.5. We can describe how and why our work makes a difference to beneficiaries (our 'theory of change').

By describing the link between the work that you do (your outputs) and the changes that it creates for individuals (your outcomes) and for society more widely (your impact), you are setting out how and why your organisation plans to make a difference. This is also known as developing your theory of change – creating a story or narrative about the changes that you want to create through your work.

As well as spelling out how you think your work creates changes for beneficiaries, your theory of change document will guide your decisions about what information you might need to collect in order to evidence the extent to which this narrative is correct.

However you choose to present your theory of change, it should be:

- **Credible** –based on previous experience and insight from different stakeholders, or from research.
- **Achievable** – do you have the necessary resources to make the differences you describe?
- **Testable** – your theory of change document will need to be linked in to your plans for collecting evidence.
- **Supported** – have you involved all the right stakeholders in the process, and do they all agree with the way your organisation is described?

### **This criterion is fully met if:**

You have a document which describes or maps out the connection between the work that you do and the difference that you plan to make for your beneficiaries and for society more widely. This document should be credible, achievable, supported, and linked in to your plans for collecting evidence.

### **What next?**

If you've met this criterion in full, you can improve your practice by...

- Including details of the timeframe in which you expect changes to happen.

Mapping timescales for the way in which beneficiaries access your services and experience outcomes will give you a more detailed understanding of when and how your work makes a difference. It can also help you to understand the 'journey' that beneficiaries experience when using your services.

- Including detail of the resources you will need and the people you will need to work with at each stage

Including information about the resources you will need (your inputs) and the partners that you will need to collaborate with for your work to be successful will help you to produce a theory of change document that is realistic and a useful tool for strategic planning.

## **1.6. We can describe how the outcomes we want to achieve overlap with the difference our partner organisations want to make.**

Organisations do not operate in a vacuum, and the work of other agencies and services will have an effect on the impact that you achieve. For example, two organisations campaigning for policy reform at the same time, in the same area, are likely to overlap, and local services working with vulnerable people are likely to support some of the same people simultaneously.

If there are other organisations doing similar work to you, you will need to consider the role that they play in your success. This might involve discussing the different outcomes that partner agencies achieve for the same beneficiaries, or thinking about the extent to which partner agencies contribute to delivering **shared outcomes** – outcomes that both you and your partner agencies would like to achieve through your work.

### **This criterion is fully met if:**

You share an understanding with partner organisations about the way in which your organisation's outcomes contribute to, or overlap, with the impact that they want to achieve.

### **What next?**

If you have met this criterion in full, you can improve your practice by:

- Developing agreements and systems that allow you to use third party information from partner agencies.

Sharing information that you have collected separately will help you to understand the extent to which your work overlaps. This will give you a more informed understanding of the role of different organisations in achieving specific outcomes.

- Working together with partner agencies to develop shared measurement frameworks or plans to measure change over the longer term.

By working in collaboration with partner agencies to develop a plan for impact measurement, you will be able to work as a team to gather information that evidences the role of each agency in achieving outcomes. Working as a team can also help you to measure the more broad-reaching, longer-term changes that come out of your work together – helping you to evidence your collective impact.

### **1.7. We are clear about the information that we need most urgently, both for reporting to funders and for internal learning.**

Before you begin collecting evidence, it is important to be clear about which information you need in order to be able to meet your reporting requirements externally to funders and commissioners, and internally to your trustees or board. It will also help you to make sure that you have all the information that you need internally to learn and improve your service. Clarifying this at the planning stage will help you to avoid collecting information that you don't need, or missing out something vital.

It will also help you to set priorities about the information you most need to collect – this is fundamentally important for building a plan for collecting evidence that matches your available resources. It may not be realistic to measure everything! Focusing on measuring a prioritised number of things well, rather than trying to measure everything, is often a more straightforward and robust approach.

#### **This criterion is fully met if:**

You have defined which information you need to in order to be able to report to funders and commissioners, and to your trustees or board.

#### **What next?**

If you have met this criterion in full, you can improve your practice by:

- Regularly reviewing what information you need to learn from your work and make management decisions.

As your work changes and develops over time, you may decide that you need different information in order to learn about and improve your impact. Regularly reviewing your information needs will make sure that you have the right information to help you continuously improve what you do.

- Thinking ahead about the information you might need to make future bids for service and organisational development.

Thinking strategically about the information you might need in the future to develop your work will help you to make informed decisions about the way you grow and fund your organisation.

### **1.8. We know what information to collect to show which goods and services have been delivered, and to whom.**

This section covers the way in which your organisation sets indicators – well-defined, easily measurable information, which shows how well your organisation is performing. You will need to set indicators that tell you about your outputs (as well as your outcomes, see 1.9).

Once you have identified your outputs and prioritised those you want to measure (see 1.7), you will need to identify output indicators – pieces of information that will help you to work out whether or not you delivered your work in the way you planned.

Output indicators are usually quantitative – that is, they collect numbers and statistics. For example, if you provided a helpline, your output indicators might be:

- Number of calls received
- Number of individual callers
- Length of calls.

You would also want to collect some qualitative information as well – that is, more descriptive information. For example, the helpline could collect information about the types of issues that were raised by callers.

You will also need to set indicators for the type of people accessing your services (for example, ethnic group, sexuality, gender, and age). This will help you to understand whether or not you are reaching your target groups, and whether or not your services are fully accessible.

### **This criterion is fully met if:**

You have set output indicators for a prioritised number of outputs, that include information about the goods and services that you delivered through your work, and the type of people who accessed them.

### **What next?**

If you have met this criterion in full, you can improve your practice by:

- Setting indicators that measure client satisfaction for all of your outputs.

Collecting information about the level of client satisfaction will help you to understand how people experience the services that you provide, and how you might be able to improve the way you work. (Note that client satisfaction is an output, rather than an outcome indicator, since it collects information on how people felt about the service they received, rather than what changed for them as a result.)

- Setting indicators that tell you about the way in which services were delivered (for example, how often services run, how long they are provided for, and who drops out).

Collecting information on the way in which services were delivered – rather than simply whether or not they were delivered – will give you more detailed information about whether or not your service is running in the way you planned. For example, it would be useful for the helpline to collect information about how often the same callers phoned the helpline, since this adds detail to our understanding of how people are using the service being offered.

### **1.9. We know what information to collect to provide evidence of the changes that beneficiaries experience as a result of our work.**

Once you have identified your outcomes and prioritised those you want to measure, you will need to identify outcome indicators – pieces of information that will help you to work out whether or not your work made the difference that you planned to achieve.

Outcome indicators are the signs that the outcome has happened, or that progress is being made towards it. They can be quantitative (measuring the number of changes that happened) and qualitative (describing people’s perceptions and experiences).

You are likely to find a number of possible indicators with each outcome. As with outcomes themselves, identify and use only the most relevant ones, to keep your evidence collection proportionate and streamlined.

To provide good evidence of change, you will need to select more than one indicator for each outcome. For example, if you wanted to measure the extent to which your networking event had resulted in the outcome of ‘increased partnership working’, your indicators might be:

- Number of new collaborations or partnerships

This would give you information about how many new partnerships had occurred.

If you want information about the nature and depth of those new partnerships, a relevant indicator might be:

- Level of information sharing

#### **This criterion is fully met if:**

You have selected a number of priority outcomes and set at least two outcome indicators for each. Your outcome indicators can provide you with the information you need to assess whether and how your organisation has achieved the outcomes that it planned.

#### **What next?**

If you have met this criterion in full, you can improve your practice by:

- Making sure that you have a good mix of qualitative and quantitative outcome indicators that include different people’s perspectives on the difference your work made

Selecting a range of qualitative and quantitative indicators will give you better quality information about which outcomes were achieved, and how people perceived and

experienced those outcomes. Collecting different perspectives on change allows you to compare different people's accounts of the difference your work makes, and will make your evidence for change more detailed and robust.

- Developing your output indicators in collaboration with key stakeholders and beneficiaries.

Asking beneficiaries about the way that they experienced outcomes from your project will give you useful details that you can turn into relevant indicators capable of collecting good quality evidence of change. For example, if your work aims to reduce isolation for older people, and the people using your project tell you that the difference your work made was that they socialised more often, this suggests that 'how often people meet up with friends' would be a meaningful outcome indicator.

### **1.10. We choose data collection tools that meet our information needs and suit our context.**

The type of tools and methods you use to collect data should be in proportion to your information needs. If you are testing a new type of project, or you want to gather evidence that is robust enough to influence policy change, you may decide to use a validated tool – that is, one that has been developed and tested by academics and impact measurement specialists. However, if you are collecting straightforward information to report back to your funders and trustees, you may decide to create your own data collection tool that suits your purposes, or to adapt one that already exists.

Once you have prioritised the outputs and outcomes that you want to collect information on, and set your indicators, the next planning stage is selecting data collection tools – for example, questionnaires, focus groups and interviews.

In order to collect good quality evidence, your data collection tool needs to be appropriate to your context. This involves thinking through three key considerations.

#### **1. What sort of information do I need?**

If you want to collect basic quantitative data (numbers and statistics), you may find that a simple questionnaire suits your data collection needs. However, if you want to collect in-depth information about how people experienced different outcomes and what they thought about them, you will need to choose more 'open' data collection tools, such as interviews and focus groups.

#### **2. Which tools would work best in the context of my work?**

Not all data collection tools can be applied equally successfully in different contexts. A questionnaire designed for older people might work well in context, but very poorly in youth work setting if young people find it dull to complete or difficult to understand. Before

choosing a data collection tool, you will need to think about your particular context, and how you can make data collection easy and interesting for the people you want to collect information from.

### **3. Which tools will give me data that I can easily collect, store and analyse?**

Think carefully about the skills level and time available to the people who will be collecting the data. Your tool will need to work for your staff and volunteers, as well as for your beneficiaries. Thinking ahead to storage and analysis is also sensible. Before choosing a tool which gives you a large amount of very detailed information, ask yourself whether you have the necessary IT to store it safely, and the skills to make sense of it during analysis.

#### **This criterion is fully met if:**

You have selected data collection tools that can capture all of the information you need, which make data collection easy for your beneficiaries, and which suit the time and skills level of those people responsible for collecting and analysing the data.

#### **What next?**

If you have met this criterion in full, you could improve your practice by:

- Consulting your staff, volunteers and beneficiaries about data collection tools.

Asking the people who you want to collect data from about which tools they think work best will help you to select data collection methods that are tailored to your beneficiaries' needs – which, in turn, will give you better quality evidence. Talking to the people who will be collecting the data about data collection tools will give you a more informed picture of which tool will fit most easily into their day-to-day work.

- Including a validated tool in your range of data collection tools where appropriate

Introducing a validated tool into your plan for data collection can sometimes improve the standard of evidence that you collect. If many other organisations are using the same validated tool, it may also allow you to compare your outcomes against other people who are doing the same sort of work (benchmarking). However, validated tools only collect good quality data if they are used in a relevant and appropriate setting and in the right way, so you will still need to think carefully about whether or not they are right for your particular context.

### **1.11. We have a plan which sets out how and when evidence will be collected, and by whom.**

Having decided on your priorities for collecting evidence and selected your tools, you are now ready to draw up your framework. Your framework clarifies which outputs and

outcomes are going to be measured, with what tool, when and by whom. Essentially a road map for collecting evidence, your framework is a crucial tool for making sure that nothing important gets left out of your data collection plan, and that everyone understands their particular role in collecting information.

**Sample evaluation framework:**

Outcomes	Indicators	Information collection tools	Who and when
Improved job search skills	<p>Numbers with a CV</p> <p>Ability to identify suitable jobs</p> <p>Ability to complete application form</p> <p>Appropriateness of presentation</p>	<p>Job log database</p> <p>Case file</p> <p>Self-assessment form</p> <p>Staff observation grid</p>	<p>Case worker</p> <p>At assessment/ review sessions</p>

**This criterion is fully met if:**

You have a framework or mapping document which sets out: what information you want to capture on outputs and outcomes; how this data will be collected; when it will be collected; and who is responsible for collecting it.

**What next?**

If you have met this criterion in full, you can further improve your practice by:

- Including a description of how the information will be used

Adding this information to your framework will provide an additional check to make sure that you aren't collecting anything unnecessary, and that all of your priority outputs and outcomes are included.

- Linking your framework to your strategic planning processes by including targets

Including targets for your outputs and outcomes will turn your framework into a useful tool for strategic planning as well.

### **1.12. We have realistic targets that set out what we want to achieve.**

Your plan for evidence collection should be informed by your understanding of the information you need for strategic planning – that is, the data your trustees require to understand whether or not your organisation is working as effectively as planned.

Setting realistic targets for what you want to achieve as an organisation is a good way of building this link between gathering evidence and strategic planning. Good targets will be time specific, and will clearly set out what success looks like. However, they should not add up to more than your capacity. When thinking about setting reasonable targets, consider:

- Your resources
- What you have achieved before
- What other, similar organisations have achieved
- The level of need for your work (as evidenced by your needs assessment)

#### **This criterion is fully met if:**

You have set realistic targets for your priority outputs and outcomes, that clearly describe what your organisation plans to achieve.

#### **What next?**

If you have met this criterion in full, you can further improve your practice by:

- Setting targets around the quality of the work delivered, as well as the quantity

Including client satisfaction targets will help you to paint a clear picture of what success should look like for your organisation in this area.

- Consulting with your trustees, staff, and volunteers about targets

Talking to the people responsible for delivering the work and meeting targets should help you to set targets that are realistic and motivating.

### **1.13. We look at the resources available for focusing on our impact and identify any gaps.**

Good impact practice requires a number of different resources – including staff time, IT, skills development, and money, (especially if you decide that you need external support from a consultant or specialist). Committing the right amount of resources to impact practice is crucial to doing it well. However, impact measurement should not take up a disproportionate amount of time and money.

Assessing your available resources will help you to build a realistic plan for collecting and making sense of evidence to show your impact. It will also give you a more informed picture of the costs involved, which will help you to come to an agreement with your funders and

commissioners about the amount of information that it is reasonable to expect you to collect.

In the longer term, understanding where the resource gaps are will help you to develop a plan for meeting these gaps, and to make a better case for adequately resourcing impact measurement within your organisation.

### **This criterion is fully met if:**

You have a clear picture of the resources available, including IT, money, staff time, and skills. You are able to identify where the resource gaps are and to explain how these could be met.

### **What next?**

If you have met this criterion in full, you can further develop your practice by:

- Building a clear plan for how to develop your resources in the short term.

Once you have identified the gaps in your resources, you are in a better position to think through how best to meet these in the short term, for example through staff training. This will allow you to make some relatively quick improvements that will increase your capacity to measure your impact.

- Building a clear plan for how to develop your resources in the long term

Building a longer-term plan will give you more of a strategic view on how your organisation could manage resources for impact measurement in the future – for example, by acquiring a new database or hiring a consultant to help with a specific area or task. This can help to make a case for developing your capacity in this area.

## **1.14. Resources for this section**

Using local information to provide evidence of the need for your work

Neighbourhood Statistics is an online government portal that allows you to search 2011 census data. Enter your postcode to find statistics on demographic profile, crime rate, education, health, housing, deprivation, lifestyles, work and environment.

The portal can be accessed at:

[www.neighbourhood.statistics.gov.uk](http://www.neighbourhood.statistics.gov.uk)

Knowing which information to collect to evidence that goods and services have been delivered/ to

Charities Evaluation Services, Keeping on Track: A guide to setting and using indicators (2008)

This booklet provides a step-by-step guide to setting and using indicators.

<p>evidence the changes that beneficiaries experience</p>	<p>The guidance is illustrated by good-practice case studies, and takes account of what funders and commissioners regard as good quality indicators. It also offers practical guidance on how to set and use indicators that will help you to monitor your work effectively.</p> <p>The report is free to download from the CES website: <a href="http://www.ces-vol.org.uk">www.ces-vol.org.uk</a></p>
<p>Mapping the description of how and why your work makes a difference (your theory of change)</p>	<p>Charities Evaluation Services, Making Connections: Using a Theory of Change to Develop Planning and Evaluation (2011)</p> <p>The document provides an overview of the theory of change approach and explains more about how the approach is used. It goes on to provide a greater detail through the several steps of developing a theory of change and discuss what you will need to include to make it most useful.</p> <p>The report is free to download from the CES website: <a href="http://www.ces-vol.org.uk">www.ces-vol.org.uk</a></p> <p>New Philanthropy Capital, <b>Theory of Change (2011)</b></p> <p>This short paper introduces theory of change, explains the origins of the technique, and discusses how it can be used by charities to improve their work.</p> <p>This document is free to download from the NPC website: <a href="http://www.thinknpc.org/publications/theory-of-change/">http://www.thinknpc.org/publications/theory-of-change/</a></p>
<p>Developing a plan</p>	<p>Sample evaluation frameworks can be downloaded from the CES website: <a href="http://www.ces-vol.org.uk">www.ces-vol.org.uk</a></p>
<p>Useful websites</p>	<p>Jargonbusters is a free, go-to resource for third sector organisations, funders and government and regulatory bodies alike, that provides clear definitions of the terms used in monitoring and evaluation. <a href="http://www.jargonbusters.org.uk">www.jargonbusters.org.uk</a></p>

## 2. Do

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If Plan is about describing the changes that you want to create through your work, and deciding what information to collect, Do is about data collection - the process of gathering evidence for how and why your work makes a difference.

This section of Measuring Up asks you to think about how to collect data in a way that is ethical, streamlined to your way of working, and robust enough to demonstrate a convincing connection between the goods and services that you provide and the changes that beneficiaries experience.

Do also covers the issue of beneficiary participation. Opportunities for beneficiaries to get involved in data collection will vary from organisation to organisation, depending on the resources available, the type of information you need to collect, the sort of beneficiaries you work with and the benefits and risks to increasing involvement in your particular context. However, when done properly, involving beneficiaries in collecting data can be empowering for the people involved, and produce good quality evidence.

The standard of 'proof' you require will influence your approach to data collection. For many organisations, collecting 'before and after' data that strongly suggests a link between the work you do and the changes that beneficiaries experience will be evidence enough.

However, if your organisation has greater resources to dedicate to impact measurement, or if you are measuring your impact in order to influence policy change or to see if other people should adopt your way of working, you will need to go to greater lengths to prove the link between your work and the changes you observe. The guidance in this section includes information on how to pick an approach to data collection that is proportionate to your resources, impact measurement goals and context.

### **2.1. We have clear leadership on impact practice, and everyone understands its value to our organisation.**

This criterion looks whether or not everyone in your organisation sees measuring and making sense of your impact as valuable and important work. It also asks about the extent to which thinking about impact has been embedded in your everyday work, becoming an integral part of how you operate, rather than a separate task.

How effective you are at measuring your impact is dependent in large part on the enthusiasm and commitment of the people collecting and making sense of the evidence (your staff and volunteers), and the people receiving the information (your managers and trustees). Making sure that everyone understands the value of measuring your impact is critical to collecting good quality data.

An important part of this involves having clear leadership around impact, whether this is a person, a team or a working group. This will allow you to make a convincing case for impact measurement, to promote it as a valuable activity within your organisation, and to drive it forwards.

However, effective leadership on impact doesn't have to take a 'top-down' approach. Involving people from all levels of your organisation, staff, volunteers, trustees and even beneficiaries, will help you to spread understanding and enthusiasm for impact measurement throughout your organisation.

### **This criterion is fully met if:**

You have a named person or group responsible for focusing on the organisation's impact. Everyone in the organisation sees impact measurement as a worthwhile activity.

### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Making sure that thinking about impact is seen as a fundamental part of each role, rather than an afterthought

Including impact in the way peoples' roles are defined and reviewed will help people to see it as a core part of their everyday work. You might put information about impact measurement in job descriptions, or include discussing impact as a regular item during staff supervision and team meetings.

- Making impact measurement a regular item in team meetings, supervision and appraisals

Being able to discuss problems with how evidence is collected, as well as celebrate findings and successes, will help to deepen the enthusiasm, involvement and understanding of staff, volunteers and trustees.

## **2.2. We collect the right amount of evidence, from the right sources, in order to measure our impact effectively.**

Sometimes, because of limited resources or logistical issues, it might not be possible to collect data from everyone you work with. In these cases you will have to think about collecting information from a **sample** (a smaller selection from a larger group).

However, decisions around how much data to collect and from whom will be determined by the purpose of your sample. If you want to be able to **generalise** (draw conclusions about all of your beneficiaries from the data you collect from a sample), you will need to think carefully about your sample size, to make sure that it gives you the right amount of data, and

also about the **representativeness** of your sample – that is, whether or not all groups are included.

However, there may be times when you want collect data from different groups in order to get a more in-depth picture of the amount and type of change that particular beneficiaries experience as a result of your work. For example, if you wanted to understand more about what the barriers and enabling factors were for achieving positive outcomes, you might decide to separate out data from beneficiaries who had achieved excellent outcomes, and beneficiaries who had achieved very poor outcomes. This is called **selective sampling**. In this case, you will need to make sure that your sample contains within it the right groups in order to tell you what you most want to know, rather than making sure that everyone is equally represented.

There are many different methods of building a good sample, and different approaches to suit the type of data that you want to collect. However, your resources will also be a big consideration when you decide the size and scope of your data collection, both in terms of how much data you can realistically gather, and how much time you can spend on making sense of it during analysis. If you are measuring your impact to learn more about the difference your work makes and to report back to funders and commissioners, consider your available resources and decide on what the largest sample size is that you can feasibly manage. Taking a realistic approach to sample size, and focusing on making sure that the right groups are represented for the purpose of your sample (either to generalise about all beneficiaries, or to gather detailed information about particular groups), will help you to gather useful information that you can use to evidence your impact.

If you are measuring your impact to see if other people could adopt your way of working or to influence national policy, you may well need to gather data from a larger sample, to meet a higher standard of evidence. You will also need to rely on more technically sophisticated methods for setting your sample.

### **This criterion is fully met if:**

The size and scope of your data collection suits the type of data that you want to collect, is in proportion to your available resources, and allows you to draw conclusions about your impact across the different groups you work with.

### **What next?**

If you have met this criterion in full, you could improve your practice by:

- Checking during data collection that all relevant groups are represented in your data, especially hard to reach groups

Checking as you go along to make sure that you are gathering data from the right groups will give you time to make adjustments if necessary.

- Collecting additional data if necessary to make sure that all relevant groups are represented

If your checking processes reveal a gap, you will need to gather additional data to be sure of having a sample that will give you the information you need.

### **2.3. We have processes in place to follow up when beneficiaries haven't provided us with information.**

This criterion is about managing **response rate** – the number of people who decide to participate by giving you information, out of the total number of people that you ask to participate.

Getting enough beneficiaries to participate is crucial to gathering enough data to be able to make decisions about the difference your work is making. The way you plan to collect your evidence will help you with this to an extent – for example, if people find your data collection tools easy to respond to and if your tools are well suited to the people you want to collect data from, they are more likely to give you all of the information you need. However, to encourage people to participate in impact measurement, you will also need to think carefully about collection.

It is important to keep track of who has provided you with information, and to have a plan for following up with people to encourage them to participate if they've not done so already, or if they have provided incomplete answers. Whatever strategy you devise will need to be in proportion to your available resources. For example, you might decide to re-contact people about an online survey a maximum of three times. Or, if you wanted to collect data by interviewing people six months after you had finished supporting them, you could take steps to collect contact information from beneficiaries so that you could keep in touch, and provide information about the interviews in local community centres or through service user forums.

#### **This criterion is fully met if:**

You have a process in place for following up with people who do not respond or who don't provide all the information that you need. Your process for following up with people suits the resources you have available.

#### **What next?**

If you have already met this criterion in full, you can improve your practice by:

- Meeting individual accessibility needs wherever possible to make sure that everyone has an equal opportunity to participate

Thinking about how you can apply your data collection tools flexibly will help you to gather responses from groups with different needs. For example, you might be able to carry out your questionnaire over the phone or in person with people with limited literacy, or have an interview in a location that is more accessible.

- Developing a proactive plan to ensure a good response rate from harder to reach groups

Harder to reach groups may well be those that you are most interested in getting a good response rate from. Thinking ahead about how to encourage their participation in impact management – for example, by promoting your evaluation through online forums or local community centres, or using interpreters during data collection – will help you to make sure that you can collect the information you need.

## **2.4. We test out new tools to check for any problems, and we make changes as necessary.**

This criterion looks at the way your organisation manages the quality of the data you collect, by testing out your data collection tools.

Making sure your tools are fit for purpose involves **piloting** – road testing them for a short period, and amending them if necessary. It is not unusual for the piloting stage to turn up unexpected issues or to generate poor quality and/or unusable data, so it is very important to conduct a pilot before rolling out a new data collection tool.

Your piloting timeframe should be long enough to tell you if something is wrong with your tool. This means waiting until the people collecting the data have got used to using it, and until they have tried it out in all possible settings, with all the groups that you want to collect data from.

When testing your tools, you need to consider the following key points:

- **Validity**  
Does the tool collect the information that you wanted to collect? Or is it gathering information about something you are less interested in?
- **Reliability**  
Does it work equally well with all the groups that you want to collect information from? Can it collect information consistently?
- **Usability**  
Do the people collecting the information find it easy to use?  
Looking through your data you gathered during the pilot will often help you to answer at least some of these questions. However, gathering feedback from the people who collect information is also useful, especially in terms of deciding what to change about your tools.

### **This criterion is fully met if:**

You pilot all your data collection tools fully, and check them for validity, reliability, usability. Amendments are made, if necessary, before the tool is rolled out.

**What next?**

If you have already met this criterion in full, you can improve your practice by:

- Discussing possible improvements to your tools with beneficiaries, staff and volunteers

Talking to the people responsible for collecting the data, and for the groups you want to collect data from, will give you useful information about how to change and adapt your tools to improve the quality of the data they collect.

- Reviewing your tools to make sure they remain relevant over time

Over time, things can change, such as the balance of skills across your staff team, your information needs, and even your beneficiary groups. Reviewing your tools periodically will help to make sure that they remain effective in your particular context.

**2.5. People are supported to collect data accurately and consistently.**

Your data collection tools will have to be used consistently and appropriately by the people responsible for collecting the data in order to give you the quality and quantity of information that you need. This means providing training, information resources, and ad hoc support around data collection to make sure that everyone understands how to collect data properly.

**This criterion is fully met if:**

Everyone responsible for data collection understands how to apply data collection tools in order to collect information accurately and consistently. People know where to go or who to ask for further support.

**What next?**

If you have already met this criterion in full, you could improve your practice by:

- Reviewing the data you collect for accuracy and consistency, and taking action if necessary

Checking the information you have for completeness and quality will help you to understand if there are any gaps in the quality or consistency of data collection. Some databases will allow you to check data in this way, although alternatively you could pick a sample of data at random to review the way it was collected (this is also known as **dip sampling**). Reviewing your information in this way will help you to take action where you find inaccurate data.

- Including data collection in staff reviews and appraisals

Including data collection in team reviews and appraisals will help you to address issues around poor quality or inconsistent collection, and to identify training or support needs.

## **2.6. We collect before and after evidence from our beneficiaries to see if our work has made a difference.**

This criterion looks at the way in which you gather information to provide evidence of the changes that result from your work.

Different organisations will require different standards of evidence to demonstrate that changes have occurred, and that these changes result from the goods and services that they provide. If your organisation is interested in measuring its impact for the purposes of learning more about your work, or for reporting back to funders, it is usually enough to provide 'before and after' data which suggests, rather than proves, a logical connection between the work that you do and the outcomes that beneficiaries experience.

However, if you are measuring your impact in order to influence policy change or to find out if your way of working could be replicated successfully by other organisations, the standard of evidence you will need will normally be higher. This will involve going to greater lengths to prove and describe the link between the outcomes beneficiaries achieved and the work that you delivered. To gather this sort of information, you will need to use more sophisticated ways of collecting data, such as the methods described in the 'what next?' tips for practice development below.

In order to understand the extent to which your organisation has created change for beneficiaries, you need to establish a clear picture of what things were like before and after your work. This is usually done by collecting **baseline data** – data which shows what things were like before your work - and then collecting the same information at a later point to show evidence of change. This could be done through a one-off follow up, or a repeated review (to get a more detailed sense of the pace and direction of change). Collecting data in this way is also sometimes referred to as establishing '**distance travelled**', since asking the same questions at least twice will show you the amount and type of change that beneficiaries have experienced.

How and when you collect 'before and after' data will depend on your chosen tools and your understanding of when beneficiaries achieve different outcomes (see 'Plan'). If you are unable to collect data both before and after your work, you can sometimes collect your 'before' data retrospectively by asking beneficiaries to reflect on how much change they have achieved, but because this method is more reliant on reflection and memory, it is not always a straightforward way of collecting accurate data.

### **This criterion is fully met if:**

You gather evidence that allows you to compare the 'before' and 'after' picture for beneficiaries, and which allows you to draw conclusions about the extent to which your work has created change.

## What next?

If you have achieved this criterion in full, you can improve your practice by:

- Drawing on existing research to compare the changes beneficiaries experience with groups who did not receive our support

Comparing your outcome data with research on outcomes for similar groups who did not receive support will give you a more informed picture of the amount of change that is likely to be due to your work, and the amount of change that would probably have happened anyway. This will help you to make a more credible case for the difference your work makes.

For example: government research shows that just 35% of homeless young people aged between 16–24 maintain a new tenancy in an area where no additional support is provided. However, your outcome data shows that for the homeless young people that you support, 65% maintain their tenancy. Using existing data to draw this comparison adds weight to the case that the changes young people experience are down to your work.

- Collecting information from a control group

Collecting your own information from a **control group** – a group that is the same as your beneficiaries in every way, other than the fact that they have not received your support – provides the most robust evidence that the outcomes beneficiaries achieve are down to your work. Comparing data from your beneficiaries and your control group will give you a detailed, informed sense of the extent to which your work makes a difference.

## **2.7. The level of involvement that beneficiaries have in our data collection processes suits our ethos, our information needs, and our available resources.**

This criterion looks at the way your organisation consults and involves beneficiaries in your data collection processes.

Beneficiary involvement in data collection is a continuum, which runs from simple consultation (such as gathering feedback on the way you collect information) through to ownership, where beneficiaries take the lead on planning, data collection, analysis and learning. When deciding the level of involvement that is appropriate for your organisation, you will need to consider the following issues:

- **Ethos and values**  
If your organisation has an empowerment focus or a ‘service-user led’ philosophy underpinning its work, actively involving beneficiaries in data collection may be particularly relevant to your context. If properly supported and resourced, involvement may also contribute to what you hope to achieve for the people who use your goods and services.
- **Data quality**

In certain contexts, ex-service users may well be able to gather more honest and detailed information than your staff and volunteers. However, to ensure data quality, you will need to train, develop and supervise beneficiaries as they prepare for and go about data collection, in exactly the same way that you would support staff and volunteers.

- **Resources**

In general terms, the greater the level of involvement, the more resources you will need to support beneficiaries. This could include providing training and support, supervision, IT support, or equipment. You will also need to factor in time for fully de-briefing beneficiaries after their participation, to check that their support needs have been fully met.

- **Ethical considerations**

If your beneficiaries are vulnerable people, you will need to think carefully about whether there is any aspect of their involvement which could potentially increase their vulnerability, endanger their safety and wellbeing, or in any way undo some of the positive changes they have experienced as a result of your work.

### **This criterion is fully met if:**

The role that beneficiaries play in data collection is appropriate to your ethos, the sort of information that you need to collect, and the resources that you are able to dedicate to beneficiary involvement.

This criterion looks at the level of appropriateness, rather than the level of involvement itself. If you have considered all the factors above and decided that there is no appropriate role for beneficiaries in your data collection processes, you will still meet this criterion in full.

### **What next?**

If you have met this criterion in full, you could improve your practice by:

- Periodically reviewing the role that beneficiaries play in your data collection processes

This will make sure that you have an up to date picture of the resources, risks and benefits of beneficiary involvement.

- Including beneficiary participation in the way you assess and manage resources for collecting evidence

Thinking through the resource implications of getting beneficiaries involved in the way you measure your impact, and including this in the way you think about resourcing evidence collection, will help you to put together a short- and longer-term strategy for resourcing beneficiary participation.

## **2.8. We make sure that everyone understands why we are collecting information and how their data will be used.**

This criterion focuses on the processes that your organisation has in place for making sure that data is collected ethically. Beneficiaries have the right to opt out of providing information, and a right to be informed about how you plan to store and look after the information that they provide. Obtaining informed consent means making sure that beneficiaries have all of the information they need from you in order to be able to make an informed choice about whether or not to participate.

Your organisation will need to take steps to make sure that beneficiaries understand why you are collecting information from them, as well as how you plan to keep it safe and confidential, and how you will use it. This will involve explaining to beneficiaries how you plan to report on and use your findings, so that they can make a choice about whether or not they would like to see what you write about them, or whether they would like to remain anonymous.

### **This criterion is fully met if:**

You have processes in place to make sure that everyone who participates understands why you are collecting information from them, and how the information they share will be used and presented.

### **What next?**

If you have already met this criterion in full, you can improve your practice by:

- Routinely giving people information about their rights as a research participant

In addition to obtaining informed consent, routinely providing people with more in-depth information about their rights as a research participant (for example, being able to withdraw at any point and to see whatever information your organisation holds about them) will help to inform and empower the people you are collecting information from.

- Thinking through any longer-term risks for people participating in impact measurement and providing appropriate support

Obtaining informed consent will help beneficiaries to think through any immediate risks involved in participating (for example, being identified as someone who uses your goods and services). However, if you are working with vulnerable people or collecting data on sensitive topics, you will need to think carefully about whether your data collection activities might carry a longer-term risk for participants, such as emotional distress. In these cases, you will need to provide information about, or access to further support in order to meet your ethical obligations.

**2.9. Resources for this section**

<p><b>Choosing data collection tools</b></p>	<p>Charities Evaluation Services, Assessing Change: Developing and Using Outcomes Monitoring Tools (2010)</p> <p>This guide is a practical handbook aimed at helping to identify and develop ways to collect information on the outcomes of one’s work. It provides a guide through planning the outcome monitoring, selecting appropriate methods, developing tools, preparing and collection of the outcomes information.</p> <p><a href="http://www.ces-vol.org.uk">www.ces-vol.org.uk</a></p>
<p><b>Involving beneficiaries in data collection</b></p>	<p>Voluntary Action Westminster, Involving People – A Practical Guide</p> <p>This guide contains information about involving people in data collection, and discusses a range of data collection methods that involve greater participation of beneficiaries.</p> <p>The guide can be downloaded at: <a href="http://www.vawcvcs.org">http://www.vawcvcs.org</a></p>
<p><b>Collecting data ethically</b></p>	<p>The Social Research Association has published guidelines that set out what ethical practice looks like in research and evaluation.</p> <p>These can be accessed at <a href="http://the-sra.org.uk">http://the-sra.org.uk</a></p>
<p><b>Useful websites</b></p>	<p>CYFERnet is an online, free, interactive evaluation resource. Users can access brief and informative ‘learning modules’ through the site on a range of issues, including:</p> <ul style="list-style-type: none"> <li>Sampling</li> <li>Data collection</li> <li>Research methods</li> </ul> <p>There are sample questions to test knowledge, video links to further explanations by evaluation experts and many other useful tools.</p> <p>The site can be accessed at <a href="http://cyfernetsearch.org/">http://cyfernetsearch.org/</a></p>

## 3. Assess

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Assess covers data analysis – the process of bringing together the evidence that you have collected, and making sense of it in order to understand how much change has happened, for whom, and why.

In addition to covering key steps in analysis, such as comparing groups and making sense of change, this section also explains the questions you will need to ask yourself in order to get an objective picture of your impact overall. This includes thinking about the other factors that could have contributed to your impact, as well as considering how long changes last for, and how much change might have happened independently of your work. It also involves considering whether your own bias or the way you collected the data could have influenced your results.

### 3.1. We store and use people's data safely, respectfully and legally.

As part of collecting evidence, you will have to handle sensitive personal information about your beneficiaries. This personal data must be managed in keeping with the Data Protection Act if your organisation is to fulfil its legal responsibilities in terms of keeping data safe and using data appropriately.

There is a large amount of useful guidance available on how third sector organisations should handle personal data in a way that meets the Data Protection Act. Briefly, the main points of the Act state that personal data should be:

- Kept accurate and up to date
- Used only for the purpose for which it was originally collected
- Stored only within the European Economic Area (since the Data Protection Act only stands in Europe. This is important if you are storing data on an online platform.)
- Kept for only as long as is necessary
- Only gathered if strictly needed
- Kept safe from loss, damage and unauthorised access

#### **This criterion is met in full if:**

The way your organisation stores and uses the data it collects for impact measurement meets the legal requirements of the Data Protection Act in full.

#### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Developing a written policy on data protection and its relevance to impact measurement

Developing and sharing a written policy on data protection will create a helpful resource for making sure that everyone in your organisation understands the procedures in place around the legal storage and use of personal data.

- Routinely sharing your data protection policy with the people you collect information from

Explaining your policy to beneficiaries will help them to understand your responsibilities towards them as the data handler, as well as their own data rights as impact measurement participants.

### **3.2. We have IT systems in place that allow us to input and analyse our data quickly and easily.**

Making sure that data about your beneficiaries and the work you are doing with them can be stored securely, analysed and reported quickly and easily is a crucial part of ensuring impact measurement is supported by staff and volunteers across the organisation. This is particularly important for organisations that deliver a range of projects and programmes and need to track beneficiaries experience across different services.

There are a growing number of project management systems and outcome reporting platforms that have been developed to support organisations to help manage and measure the impact of their work. These include bespoke databases and IT systems that have been developed for specific types of organisation and online platforms that integrate with third party data collection, management and reporting tools. Organisations should decide which is most appropriate for them and ensure staff and volunteers are supported to use them to manage their work so that data is readily available for the wider purposes of demonstrating impact and contributing to service improvement.

Charities and social enterprises delivering front line services should be prepared to invest around 1% of their operational budgets in their monitoring and evaluation infrastructure. This will ensure that they have the best chance of becoming proficient in collecting and managing data, reflecting on it and using it to inform their practice.

#### **This criterion is fully met if:**

Data entry is quick and easy for front line staff, it is secure and can be aggregated and analysed to demonstrate impact and inform service improvement.

#### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Storing your data in a way that makes checking for missing or incorrect data quick and easy

Checking for missing or incomplete data is far easier to do once your data is all in one place. This will help you to understand and improve your data quality.

- Storing your data in a way that means you can automatically generate reports

There are obvious time savings involved with automatic reporting. Automatic reporting will help you to prepare the information for analysis and to work with your data much more easily.

### **3.3. We compare different types of information to make sense of how and why changes occur for beneficiaries.**

This criterion focuses on the way in which you bring your evidence together during analysis to explain how and why your work makes a difference.

Explaining why changes occur is vital to understanding your impact. Using your data to explain change requires two steps to analysis. Firstly, you will need to analyse each type of data separately to make sense of it. Secondly, you will need to bring together different pieces of information during analysis to try and explain why changes happen.

This might involve bringing together different types of data about the same beneficiaries. For example, you could compare quantitative data from a questionnaire, which tells you how many people experienced a particular outcome, with qualitative data from interviews where the same people provided in-depth information about how they experienced different outcomes and why they thought those outcomes were achieved.

You may also want to compare different perspectives on change to try and understand why outcomes occur. For example, if you were working with young people, you might collect data from the young people themselves about outcomes, and from their parents and carers as well. Examining the way in which the two groups give different or similar explanations for change will help you to get a more in-depth picture of why outcomes occur.

#### **This criterion is fully met if:**

You compare and contrast different types and sources of data, in a way that helps you to understand why beneficiaries experience outcomes as a result of your work.

#### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Identifying strong and weak findings by looking at the way in which different data sources support or contradict each other

Reviewing the way in which different sources of information support or contradict each other will give you a sense of which of your findings are strongest. It will also help you to

identify where your data is still inconclusive, and where you might need to collect more information.

- Exploring your initial findings with key stakeholders during analysis

Exploring contradictory or inconclusive data with your beneficiaries, staff and volunteers during analysis will help you to fill in any gaps and to improve your understanding of your findings. This process of presenting and discussing your findings to build meaning during analysis is called **iteration** and is a useful tool for adding quality and depth to your findings.

### **3.4. We check to see if different groups of beneficiaries experience different amounts or different types of change as a result of our work.**

This criterion looks at the way you compare and contrast outcome data for different groups of beneficiaries during analysis, to find out whether different groups experience different changes as a result of your work.

Trends and patterns in outcome data for the whole of your beneficiary group may hide important differences between different groups. Separating out data for different groups in order to compare and contrast the amount and type of change that they experience – also described as **disaggregation** – is an important step in your analysis, since it is crucial to understanding whether or not your work is reaching everyone in your target group.

Disaggregation will often throw up important questions and learning points. For example, if particular ethnic groups or age bands are achieving better outcomes from your work, does this indicate a particular strength in the way you deliver your work that your organisation can learn from, or that the services you provide are not relevant or appropriate for everyone in your target group?

#### **This criterion is fully met if:**

You compare and contrast outcome data for different types of beneficiary in order to assess whether different groups experience different amounts or types of change.

#### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Drawing in different sources of information and different perspectives to explain any differences between groups

Including disaggregation in the way you bring data together to understand change (see 3.3) will add depth to the way you understand your organisation's impact.

- Discussing your findings about the differences between groups with beneficiaries, staff and volunteers

Taking unexplained differences between groups back to your staff, volunteers and beneficiaries will help you to collect additional perspectives and information to explore and explain how and why groups experience different outcomes.

### **3.5. We look carefully at negative and unexpected outcomes, as well as positive outcomes.**

Considering your findings objectively is a tricky but fundamental part of data analysis. This criterion focuses on whether or not your analysis gives equal weight to positive and less positive findings.

A danger of all research is that, without objectivity, your data can end up reflecting a rosy picture of what you hoped to find, rather than an accurate picture of how things really are. This can mean that any negative or unplanned outcomes are ignored during analysis. However, the most important learning for your organisation may rest with the negative or unplanned outcomes that you discover, so it is important that these outcomes are given due weight during analysis.

Treating negative or unexplained outcomes with the same amount of care and attention as positive outcome data means spending the same amount of time on analysis, and asking the same key questions about why changes occur, who else is involved in creating change, and how experiences differ between groups.

#### **This criterion is fully met if:**

Negative and/ or unexpected outcomes are analysed just as carefully as positive and planned ones.

#### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Thinking carefully about how the way you collected data might have influenced your findings

Reviewing the way you collected your information will help you to make objective judgements about how important your findings (negative or positive) really are. This includes considering any technical problems during data collection or issues with missing data, as well as reflecting on how your own bias might have influenced the way you interpreted the information you collected.

- Seeking external review and validation of your findings

Having your processes and findings reviewed externally, by peers or experts, will add another layer of scrutiny and objectivity to your impact measurement.

### **3.6. We think through the other factors that might have influenced the outcomes that beneficiaries experience.**

In order to fully understand your impact, your analysis will need to consider the question of **attribution** – that is, an assessment of how much change was down to your work, and how much was down to the work of others.

Change is complex: in every context, there will always be a number of other agents involved in creating outcomes, including other organisations, other professionals, and even beneficiaries' families and friends. This means that it will not be possible to come up with a precise figure or percentage of the change that is due to your work alone. However, being able to recognise and describe the role that others play in achieving outcomes for beneficiaries is an important part of data analysis.

Making a sensible estimation of attribution, based on your professional experience and your understanding of your context is a good starting point. You should also consider which other players were involved in creating change, both at the same time as your work, and also in terms of laying the foundation for your work with beneficiaries.

#### **This criterion is fully met if:**

You use what you know about the involvement of others in creating change to draw sensible conclusions about the extent to which other actors or circumstances may have supported or held back the achievement of your planned outcomes.

#### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Collecting detailed information from beneficiaries about how other people support or undermine change

Asking beneficiaries directly about what proportion of the changes that they experienced was down to your work alone, compared to the influence of other people or factors, will help you to develop a more in-depth understanding of attribution. For example, you might ask people about the percentage of change that was down to your work, and the percentage that was down to any other organisations involved.

- Considering the way in which broader socio-economic factors support and hold back change

Drawing in wider socio-economic factors which are out of your control as an organisation – for example, widespread unemployment or climate change – will help you to understand your impact in its wider context.

### **3.7. We think through how much change might have occurred anyway for beneficiaries, without our work.**

It is possible that some of the changes that beneficiaries experience would have occurred ‘naturally’, that is, independently of your work. This amount of change that would have happened without your intervention is also known as deadweight. It is important to consider deadweight during analysis, since understanding how much change would have occurred anyway will help you to get a more accurate picture of your contribution to change, and the real difference that your work makes.

Thinking about change in this way is sometimes called considering the **counterfactual** – what would have happened anyway without your intervention, or the changes that would have occurred if your organisation did not exist.

Estimating your deadweight during analysis is not straightforward. For most organisations, considering the following questions should help you to build up a reasonable estimation of your deadweight that will meet the level of ‘proof’ you need to demonstrate your impact.

1. Would some or all of the change have occurred independently, without your involvement?
2. Could beneficiaries have achieved exactly the same outcomes elsewhere?

If the answer to these questions is yes, your deadweight will be high. If the answer is no, the chances are that your deadweight will be lower.

If you have the resources available, and if you require a higher standard of evidence around the amount of change that would have happened independently of your work (for example, if you are measuring your impact in order to influence policy change or to see if the way you work could be replicated by other people), then you will need to compare your outcome data against data from a similar group who did not receive goods or services from your organisation.

This can be done in two ways: firstly, by using existing research, where available, about the outcomes that occur for similar groups of beneficiaries without the type of support that your organisation provides; and secondly, by collecting your own data from a control group (a similar group who did not receive support from your organisation). These methods require more time and resources, but will give you a higher standard of evidence to take account of what would have happened anyway.

#### **This criterion is fully met if:**

You are able to describe the extent to which positive outcomes might have occurred independently of your work.

#### **What next?**

If you’ve met this criterion in full, you could improve your practice by...

- Comparing your outcome data with existing research looking at outcomes achieved independently by similar groups

Comparing your outcome data with existing research, where available, on the outcomes that similar groups achieve independently of the type of support your organisation offers will give you a more informed sense of what would happen if your organisation did not exist.

For example, if you provided support that aimed to reduce levels of long-term unemployment, you could look at local data to see what proportion of local people found work after six months of unemployment, and compare this with data on the proportion of your beneficiaries who found work after the same period. The difference between the two figures would show you how much change is likely to have occurred without your intervention.

- Comparing your outcome data with a control group

Collecting data from a control group will help you to establish a more accurate picture about how much change would occur without your work, and to gather a higher quality of evidence to demonstrate how much change would have occurred independently of your work.

### **3.8. We can describe where outcomes from our work overlap with costly economic, social and environmental issues (for example, climate change or unemployment).**

Making a financial case for your work means highlighting the connection between the outcomes you achieve for groups of beneficiaries, and your organisation's contribution to 'costly' societal problems, for example unemployment, environmental damage, and offending. Presenting your outcome data in this way will help you to demonstrate how your work could save money for taxpayers, commissioners, funders and the government. This can be a powerful tool for explaining the value of your work to partners, funders, commissioners, and the public.

Economic evaluation is not a new idea and there are many different approaches to choose from, some of which are more complex and time-consuming than others. For the majority of organisations, simply considering potential cost savings in your analysis and describing how and where your work impacts on costly economic, social and environmental issues – rather than coming up with a specific number for costs saved or avoided - will add depth and value to the way you report your findings.

For example, if the outcomes from work include reduction in landfill waste, you could describe the cost of landfill and highlight your organisation's contribution to reducing this cost. Equally, if your work results in reduced reoffending or a reduction in serious offences, your analysis could include a summary of the costs involved in court proceedings and

custodial prison sentences, and a description of how your work can result in some of these costs being avoided.

However, if your funder or commissioner requires you to demonstrate your impact in financial terms, or if you want to look in greater detail at the potential savings that result from your work, you will need to consider using a more sophisticated methodology to describe the financial value of your work – for example, cost effectiveness analysis or Social Return on Investment (SROI).

### **This criterion is fully met if:**

You are able to describe how your work overlaps with costly economic, social and environmental issues, and where the outcomes you achieve for beneficiaries could potentially contribute to cost savings.

### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Relating your outcomes against the cost of delivery to demonstrate your cost effectiveness.

Relating the outcomes you achieve for beneficiaries to the cost of delivery (your input) will give you information about how much it costs to deliver each outcome. This is also known as your cost effectiveness. Comparing your cost effectiveness with other organisations is a useful way of highlighting any potential savings for funders and commissioners.

- Describing the overall economic, social and environmental value of your work in financial terms by using monetisation.

Monetisation involves setting a proxy financial value for each outcome achieved - whether economic, environmental or social - in order to be able to describe your overall impact in financial terms. This methodology is used in SROI

## **3.9. Resources for this section**

### **Storing data respectfully and legally**

The Information Commissioner's Office (ICO) is the UK's independent authority set up to uphold information rights in the public interest, promoting openness by public bodies and data privacy for individuals. The ICO website contains useful guidance for organisations about how to keep personal data in line with the Data Protection Act.

[www.ico.gov.uk](http://www.ico.gov.uk)

<p>Using IT systems to input and analyse data quickly and easily</p>	<p>Performance Hub, Using ICT to improve your monitoring and evaluation (2008)</p> <p>This workbook covers the steps and issues that you will need to consider to develop appropriate computer systems that help you with impact measurement.</p> <p>The workbook includes a free IT development checklist that can be downloaded from the CES website: <a href="http://www.ces-vol.org.uk">www.ces-vol.org.uk</a>.</p> <p>NCVO, A guide to managing ICT in the Voluntary and Community Sector (2007)</p> <p>This guide covers the main issues that VCOs face in managing ICT, from policies and procedures to keep things running; from how to produce an ICT strategy to putting realistic costs in your funding bids.</p> <p>The guide can be downloaded for free at: <a href="http://www.ncvo-vol.org.uk">www.ncvo-vol.org.uk</a></p>
<p>Describing where outcomes from our work overlap with costly economic, social and environmental issues</p> <p>Thinking through the other factors that might have influenced outcomes</p> <p>Thinking through how much change might have occurred without our work</p>	<p>If you are interested in developing your practice further in this area, you could refer to the Cabinet Office guide to SROI (2012) which provides a detailed overview of this methodology.</p> <p>The guide also provides useful guidance about thinking through the other factors that might have influenced outcomes (attribution) and the changes that could have occurred without your work (deadweight).</p> <p>This guide can be downloaded from the new economics foundation website: <a href="http://www.nef-consulting.org.uk">www.nef-consulting.org.uk</a></p>
<p>Useful Websites</p>	<p>NCVO have a section on their website dedicated to effective ICT for third sector organisations. This includes information on budgeting for and buying a system, training and support, and planning for IT.</p>

There are also a number of resources to download such as ICT publications, research, and blogs.

This information can be accessed at:

<http://www.ncvo-vol.org.uk/advice-support/ict/managing-ict>

CYFERnet is an online, free, interactive evaluation resource. Users can access brief and informative 'learning modules' through the site on a range of issues, including:

Handling quantitative data (numbers and statistics)

Handling qualitative data (narrative and stories)

There are sample questions to test knowledge, video links to further explanations by evaluation experts and many other useful tools.

The site can be accessed at <http://cyfernetsearch.org>

## 4. Review

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In order to get the best return on the time, effort and resources you invest in planning, evidencing and making sense of your impact, you will need to use your findings for their ultimate purpose – helping your organisation to improve. Review looks at how you use your findings to get better at the way you plan, describe and deliver your work, as well as the way in which you embed your learning in order to get better at measuring the difference you make.

Whether or not you prepare a written report, you will need to think carefully about how you communicate your findings to promote your service and to spread your learning to the widest possible audience. This includes thinking about how you present your impact to funders, the public and partners, as well as feeding back to the people who were involved in the impact measurement process. It also means thinking through how to communicate your findings clearly, honestly and transparently.

### **4.1. We feed back our findings externally to partners and funders, and internally to everyone involved in measuring our impact.**

This criterion looks at the way you share your findings with key people outside of your organisation, including funders, commissioners, partner organisations and the public. It also looks at the way you feed back your findings to the people involved in measuring your impact – including your staff, volunteers, and beneficiaries.

Having gathered and analysed your evidence, you will be ready to tell people about the difference that your work makes. Whether or not you choose to prepare a formal report, make sure that you include key internal and external audiences in your plan for communicating your impact.

Externally, presenting your findings to funders and commissioners will keep you accountable to the people who fund your work, and help to increase their understanding of how and why your work makes a difference. Communicating your findings to partner organisations and to the general public will also help to raise your profile and promote your work.

Internally, it is also important to feed back to the people involved in measuring your impact: your staff, volunteers, and if possible, your beneficiaries. Sharing your findings internally allows people to see the results of their data collection, and presenting evidence of successes can be rewarding and motivating. If you are able to feed back to beneficiaries, this can be a way of thanking people for their contribution to your organisation's impact measurement process, and a way of demonstrating that the information they shared has been carefully considered and put to good use.

**This criterion is fully met if:**

You share your findings with key external stakeholders and everyone involved in gathering evidence of your impact, including staff and volunteers and, where possible, beneficiaries.

**What next?**

If you've met this criterion in full, you could improve your practice by...

- Including your findings in all your key marketing and publicity documents

Including evidence of your impact in the materials you use to promote your service will help you communicate your findings to a wider audience.

- Sharing your findings with local and national networks

Sharing your findings with local and national networks will allow you to reach an even wider audience, and to share learning across the sector.

**4.2. We provide information about how our evidence was collected when we report our findings.**

Including details of how you gathered your data - your **methodology** - is an important part of communicating your findings in a way that is clear, transparent, and allows your audience to make judgements about the strength of your conclusions.

- This involves talking about:
  - The tools you used to collect data, and how and when they were applied
  - How you decided which groups should be included in your sample
  - The number and type of groups that you collected data from
  - How you asked people to participate
- For example - did you invite people via email, put up posters in your local community centre, or ask everyone face to face?
- Whether or not you provided participants with an incentive

If you provided people with an incentive to participate, such as a voucher, you should include this in your description of how the data was collected.

It is not unusual in research for things to turn out differently from how they were planned. If you decided to change your data collection tools or if you had trouble getting back enough data, be honest and open about this in the way you present your findings. This also helps other organisations to learn about what works in terms of collecting evidence.

**This criterion is fully met if:**

When presenting your findings, you include details about how you collected your evidence, and who you collected it from, so that your audience can make judgements about the strength of your findings.

**What next?**

If you've met this criterion in full, you could improve your practice by...

- Making a clear distinction between presenting the data that you've collected, and your interpretation of it

Analysis involves two key stages – reviewing each type of data that you have collected to look for patterns and trends (sometimes called your **raw data**), and then bringing your data together in order to draw conclusions about how your work has made a difference (see 3.3).

Making a distinction between these two stages – the data itself, and your interpretation of it – is important, because it gives people information about how you have developed your findings and conclusions.

- Highlighting areas where more data is needed or where it's not possible to draw a clear conclusion

Being open about where your findings are inconclusive, or where you don't have enough data to be able to draw a solid conclusion about your impact will help your audience to understand which findings are most robust.

### **4.3. We use our findings to help us review, and to re-set, realistic and achievable targets.**

Collecting evidence about your impact will give you the detailed information you need to assess whether or not your organisation is on track with its strategic plan. Reviewing your findings against your output targets (what you hoped to deliver, and to whom) and your outcome targets (the difference that you wanted to make for beneficiaries) will help you to understand the extent to which you have been successful in creating the changes that you planned.

Once you understand your current level of achievement against your targets, you will be better placed to set realistic targets for future work. Your understanding of how and why your work makes a difference, and the pace at which outcomes are achieved for beneficiaries, will also help you to set achievable targets.

**This criterion is fully met if:**

You use your findings to review the extent to which you met your output and outcome targets, and to set targets for future work that are realistic and achievable.

**What next?**

If you've met this criterion in full, you could improve your practice by...

- Using your findings to develop a clearer picture of your strengths and weaknesses

Using your evidence to inform an assessment of your organisation's strengths and weaknesses can help you to build a strategy for change or think through where best to target your resources.

- Using your findings to identify potential areas for service development

Reviewing evidence of unmet needs can help you to identify areas where you could develop and extend the services that you provide.

#### **4.4. We use our findings to make sure that our theory of change (the description of how and why our work makes a difference) is accurate and realistic.**

Your **theory of change** describes the links between your outputs, outcomes and impact, and sets out how and why your work makes a difference. Having collected evidence of the difference your work is making, you should now be able to assess whether or not this description is accurate and realistic.

This means reviewing whether or not your work creates change in the way that you imagined, as well as considering whether or not the scale of change that you hoped to create is realistic and achievable. Reviewing your theory of change document against your findings will help you to make changes, if necessary, to the way you describe the difference your work makes.

This process is not about reducing your ambition, or lowering the bar of what you want to achieve. It is a process of making sure that you give a true picture of the difference your work makes, or can potentially make, and that the goals you are working towards are realistic and feasible given the type of change your work creates, and the resources you have available.

**This criterion is fully met if:**

You use your findings to check that your theory of change document is accurate and realistic. You make amends as necessary, based on your evidence of how and why your organisation makes a difference.

**What next?**

If you've met this criterion in full, you could improve your practice by...

- Reviewing the timeframes within which you expect changes to happen

Collecting evidence will have given you information about the timescales in which beneficiaries achieve different changes. You can use this evidence to make your theory of change more accurate and realistic.

- Reviewing the resources needed to create change

Using the evidence gathered t, you can also review your original assumptions about the resources necessary for creating change, and refine this area of your theory of change document.

#### **4.5. We use our findings to improve the way we deliver our work.**

Getting better at what you do, and improving the service that you offer to beneficiaries, is the ultimate goal of focusing on your impact. This could involve using your findings to make straightforward changes, such as changing your opening hours; or more complex ones, such as rolling out a new way of working.

Without reflecting and acting on what your findings mean for the way you deliver your work, you will leave the impact cycle unfinished, and the biggest area of learning untouched.

#### **This criterion is fully met if:**

You make changes to the way you deliver services, based on your findings.

#### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Using your findings to reallocate resources within your organisation

Once you have an understanding about which areas of your work make the most difference to beneficiaries, you may decide to reallocate resources within your organisation accordingly.

- Using your findings to set standards for the way you deliver services

Measuring your impact will give you an evidence base for deciding which processes and ways of working are most effective at creating change for beneficiaries. Developing standards for how you deliver your services, based on this evidence, will help to make sure that everyone in your organisation is working to the framework that is most likely to generate results.

#### **4.6. We review the way we measure our impact and make changes as necessary.**

Once you have completed a full cycle of planning, evidencing, understanding, communicating and learning about your impact, there will almost always be things that you would do differently the next time around. Taking the time to reflect on how your tools and processes could be improved will help you to refine and perfect the way you measure your impact, saving time in the longer term.

##### **This criterion is fully met if:**

You take the time to reflect on how your tools and processes could be improved at the end of each cycle, and make changes if necessary.

##### **What next?**

If you've met this criterion in full, you could improve your practice by...

- Including staff, volunteers and beneficiaries in a review of your impact practice

Gathering input from the people who collect data within your organisation, and the people who provide information (where possible), will help you to make informed changes to your data collection tools and processes.

- Using your learning to help identify any unexpected resource needs

You can also use your learning to inform your understanding of any resource needs you might have around measuring and making sense of your impact, and to feed into your short- and long-term plans to meet these needs.

#### **4.7. We communicate our findings honestly, including information about failures as well as successes.**

Just as collecting evidence of your impact has the potential to increase your own understanding of how and why your work is effective in creating change, it can also contribute to a wider understanding within your sector around which types of intervention are most successful, and which approaches are worth promoting and replicating.

A crucial feature of understanding 'what works' is being able to identify what does not work. As well as providing evidence of success, measuring your impact will also tell your organisation something about which areas of work are unsuccessful, and why.

Communicating honestly and openly about failure, as well as success, will spread the benefit of this learning, helping the sector as a whole to become more successful. It will also send a clear message to funders and commissioners about your organisation's commitment to evidencing, and increasing its impact.

**This criterion is fully met if:**

The way you present your findings acknowledges and explains any negative or unplanned outcomes that you discovered through impact measurement.

**What next?**

If you've met this criterion in full, you could improve your practice by...

- Acknowledging alternative explanations for success

In addition to reporting on negative and unexpected outcomes, acknowledging alternative explanations for your organisation's successes will provide a more balanced and useful account of your impact, which can make a more useful contribution to your sector's understanding about 'what works'.

- Commenting on the extent to which your findings reflect existing research into 'what works'

If there is existing research into work that is similar to yours, commenting on the way in which your findings tie in with this body of evidence will add useful depth to the way you communicate your impact.

**4.8. Resources for this section****Feeding back your findings**

The American Red Cross and Catholic Relief Services (CRS) have produced useful guidance on designing an evaluation reporting and communications strategy. This short document covers how to build a plan for disseminating your findings, as well as how to present your information clearly in different formats (written report, oral presentation etc.) It also covers more creative techniques for feeding back your findings, such as workshops, poster sessions, and webinars.

The guidance can be downloaded for free [here](#).

**Using your findings to improve the way you work**

Evaluation Support Scotland have produced a series of Support Guides to help third sector organisations make the most of impact measurement. Support Guide 4.1, Using what you learn from evaluation, describes some useful ways of making the most of your impact measurement findings.

The Support Guide can be downloaded for free from the Evaluation Support Scotland website: [www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk)

The United Nations Development Programme (UNDP) have also produced a general guide for using evaluation evidence. Chapter 7 of the UNDP's Handbook on Monitoring and Evaluating for Results, Knowledge and Learning: Use of Evaluative Evidence includes a checklist of what constitutes a good knowledge product and a checklist for improving evaluation feedback.

The handbook can be downloaded for free at:

[web.undp.org/evaluation/documents/HandBook/ME-HandBook.pdf](http://web.undp.org/evaluation/documents/HandBook/ME-HandBook.pdf)

For examples of how other third sector organisations have used impact measurement to improve their work, you may wish to refer to the CES Learning and Innovation Prize brochure, which includes case studies from eight charities and funders who put their evaluation findings to good use.

The prize brochure can be downloaded from the CES website:

[www.ces-vol.org.uk](http://www.ces-vol.org.uk)

## GLOSSARY

### Activities

The actions, tasks and work a project or organisation carries out to create its outputs and outcomes, and achieve its aims.

### Attribution

An assessment of how much change was caused by the contribution of other organisations and people.

### Baseline

Information about the situation that a project or organisation is trying to change, showing what it is like before it intervenes.

### Benchmarking

Comparison of activities, processes or results with those already achieved by an organisation itself or by another organisation.

### Control group

Participants in a control group do not receive the interventions of a project, but match in all other respects the group that does get the interventions. A control group is used for comparison purposes.

### Deadweight

An assessment of how much change would have happened for beneficiaries without your work.

### Disaggregation

Separating out data for different groups in order to compare and contrast the amount and type of change that they experience.

### Impact

The change, effect or benefit that results from the services or activities on a wider society than its direct users. It is often long term, broad and sustainable and can include affecting policy decisions at government level.

### Indicator

Well-defined information which shows whether something is happening.

**Intermediate outcomes**

The steps along the way to end outcomes. They are often smaller changes that need to happen before the final, desired outcome can be reached.

**Intervention**

Project-level or programme-level activity carried out in order to bring about specified outcomes.

**Outcomes**

The changes, benefits, learning or other effects that happen as a result of services and activities provided by an organisation.

**Outputs**

The activities, services and products provided by an organisation.

**Overall aim**

Describes why the organisation exists and the broad effect it wants to have. It summarises the difference that an organisation wants to make.

**Pilot**

A way of testing out the effectiveness of a new system by applying it to a small group and getting feedback on the process.

**Process**

The method, or step-by-step description, of how a task or activity is to be done.

**Qualitative information**

Information about what you do, achieve or provide that tells you the nature of the thing you are doing, providing or achieving.

**Quantitative information**

Information about what you do, achieve or provide that tells you how many, how long or how often you have done it, achieved it or provided it.

**SROI**

SROI is a framework for understanding, measuring and managing outcomes and impacts. It is based on involving stakeholders in determining the relevant outcomes and puts financial values on the significant changes identified by stakeholders.

**Stakeholders**

The people who have an interest in the activities of an organisation. This includes staff, volunteers, users and their carers, trustees, funders, purchasers, donors, supporters and members.

**Targets**

A defined level of achievement which a project or organisation sets itself to attain in a specific period of time.

**Target group**

The main group or groups you are working with and the people your organisation or project is aiming to benefit.

**User satisfaction**

Involves finding out what users think of activities, products or services. For example, the location, opening hours or how helpful workers are.