

MEASURING UP FOR SMALL ORGANISATIONS

GUIDANCE

**INSPIRING
IMPACT**

NCVO
CHAMPIONING
VOLUNTARY
ACTION

This guidance is designed to help you to get the most out of the self-assessment. It will help 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 of the criteria**
- **Information about why each criterion is important for impact practice**
- **A description of what your practice would have to look like in order to meet the criteria in full.**

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

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1. Plan

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, desired 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.

All organisations, whether funded or not, need to collect information about their impact. This information can help you to be accountable to your funders or beneficiaries and to learn about how to improve your work. 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 evidence to better understand the need for our work

A needs assessment is a way of researching the need 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, 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 local service provision
- The type of person, organisation, animal or environmental issue you want to create change for, 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.

Examples of websites where you can gather the information mentioned in this section can be found in the resources section.

1.2. We can describe who or what will benefit from our work

Being able to describe your target group – the main group or groups in society that will benefit from your work – 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. Or you might be looking to benefit animals, other organisations or the environment.

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:

- Deepening your understanding of who your target group is

You may want to find out more about the groups who will benefit such as what socio-economic group they belong to and whether there are sub-groups within your target group (e.g. single parents, children excluded from school or homeless people).

For a link to find out more about what the Charity Commission defines as charitable purposes, please see the resources section.

1.3. We have a clear mission statement setting out our purpose and reflecting our values

Setting out the overall purpose of your organisation through a mission statement is a good starting point to help you to define the biggest, most broad-reaching change that you would like to see as a result of your work (your impact). 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.

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.

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 has the potential to 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 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.

If you would like to find out more about outcomes, please see the resources section.

The following table may help to build understanding of possible outcomes for example areas of change:

Areas of change	Example outcomes
Health	Reduced physical health symptoms
Behaviour	Reduced offending behaviour Reduced consumption of alcohol
Attitude and self-perception	Increased motivation to find housing Increased self-confidence
Knowledge and skills	Increased knowledge of benefits Increased job-search skills
Circumstance	Service users achieve more qualifications More service users have suitable accommodation

This criterion is fully met if:

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

What next?

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

- Developing your outcomes in consultation with current 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 that you do.

- Creating a Theory of Change

A Theory of Change sets out what outcomes (changes or benefits) you expect to achieve in the short, medium and long term, to contribute to your intended impact. It shows how you expect your outputs (products or services) to deliver those outcomes and what assumptions underlie that theory. For more about Theory of Change, please see the resources section.

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

You will need to be able to measure the outputs of your work, to help you put your outcomes data in context. Your outputs are the products and services that you deliver. If you are running more than one project, it might be easier to begin by defining your outputs at a project level rather than across your entire organisation.

Firstly, you will need to be able to define what your outputs are. You can measure your outputs using **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 1.6).

Output indicators are 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.

The following table may help to build understanding of the types of indicators that could be set for example outputs:

Outputs	Output indicators
Social events	<ul style="list-style-type: none"> • Number of events held • Type of events • Number of people attending • Profile of people attending

Outreach events	<ul style="list-style-type: none"> • Number of outreach events • Number of people attending • Profile of people attending (e.g. age, gender) • Level of user satisfaction
Signposting	<ul style="list-style-type: none"> • Number of people signposted • Type of service signposted to

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. Please see the resources section for links to further information on indicators.

This criterion is fully met if:

You have set output indicators for a prioritised number of outputs, that include information about the products 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 indicator, 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.)

1.6. We know what information to collect to provide evidence of our outcomes

As well as collecting information on your outputs (1.5), you will need to be able to measure the outcomes of your work. Firstly, you will need to be able to define what your outcomes are (see 1.4). Then you prioritise which of these are most important (you will not be able to measure them all!)

As with outputs, you can then measure your outcomes using indicators. You will need to collect information that will help you to work out whether or not your work made the difference that you hoped to make.

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, or the amount of change) and qualitative (describing people's perceptions and experiences).

You are likely to find a number of possible indicators for 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 usually 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

The following table may help to build understanding of the types of indicators that could be set for example outcomes:

Outcomes	Outcome indicators
Reduced isolation	<ul style="list-style-type: none">• Level of isolation (self-reported)• How often older people socialise• Size of social circle

<p>Reduced stigma around mental health</p>	<ul style="list-style-type: none"> • How comfortable older people would be: <ul style="list-style-type: none"> • Living next door to someone with mental health problems • Leaving their grandchildren with someone who has had mental health problems in the past
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Please see the resources section for links to further information on indicators.

This criterion is fully met if:

You have selected a number of priority outcomes and set at least one outcome indicator 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 a good range of information about which outcomes were achieved, and how people perceived and experienced the change. 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.

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 what 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. This is important for all voluntary groups, irrespective of size. 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.

You will then be able 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:

- 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. Choose data collection tools that meet our information needs and suit our context

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 five 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 all different contexts. A questionnaire designed for older people might work well in context, but very poorly in a 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 skill level of the people who will be collecting the data and the time they have available. 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.

4. How much information do I need to collect?

You should be proportionate in the amount of information you collect using your tools. For a small organisation or project you might choose to use only one or two types of tool. Collecting information from a sample of your service users could also help you to be proportionate (see 2.1). In most cases, small organisations should only need to collect information on their output and outcome indicators; use these to form the basis of the content of your tools.

5. Use existing tools and processes

If your existing tools and processes are working well, you may not need to change them or they may only need minor tweaking in order to meet your impact needs.

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 skill 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:

- Adapting your data collection to take into account the evidence requirements of your stakeholders

You should consider what kind of information your staff, funders or other stakeholders require or even prefer. For example some funders prefer quantitative data, others like illustrative case studies; some prefer a combination of the two.

1.9. 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 or plan. 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.

Example evaluation framework:

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

This criterion is fully met if:

You have a framework 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.

1.10. Resources for this section

Using local information to provide evidence of	Neighbourhood Statistics is an online government portal that allows you to search 2011 census data and other government data sets. Enter your postcode to find statistics on demographic profile,
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<p>the need for your work</p>	<p>crime rate, education, health, housing, deprivation, lifestyles, work and environment.</p> <p>In Wales, you can access additional regional data on the StatsCymru website.</p> <p>Scotland has a devolved body, The National Records of Scotland, which is the central location for government data.</p> <p>Northern Ireland has the Northern Ireland Statistics and Research Agency which also holds government data and other social research.</p> <p>The Joseph Rowntree Foundation has a repository for indicators of poverty including unemployment, housing benefit and educational attainment.</p>
<p>Charity Commission</p>	<p>Charity Commission for England and Wales – Public Benefit Requirement - details how the Charity Commission defines ‘of public benefit’ and therefore eligibility to become a charity.</p> <p>Office of the Scottish Charity Regulator – Public Benefit Requirement</p> <p>Charity Commission for Northern Ireland – Public Benefit Requirement – Section 1</p>
<p>Learn more about the difference between outputs, outcomes and impact</p>	<p>Next Steps: Monitoring and evaluation on a shoestring is a guide from Charities Evaluation Services (CES) for voluntary organisations who wish to learn how to show the difference they make and improve their performance.</p> <p>New Philanthropy Capital Four Pillars Approach is a document detailing New Philanthropy Capital’s (NPC) four-pillar approach which provides practical guidance on developing an impact measurement framework.</p>

	<p>Evaluation Support Scotland Guide 1.1: Clarifying your Aims, Outcomes and Activities is a guide from Evaluation Support Scotland (ESS) that will help voluntary organisations to work out what their outcomes are and how to write them. It clarifies the connection between what you do (your services and activities) and the impact you are trying to make (your outcomes). It introduces the Weaver's Triangle (otherwise known as the CES Planning Triangle).</p>
<p>Theory of Change</p>	<p>Making Connections: Using a theory of change to develop planning and evaluation is an NCVO Charities Evaluation Services document that 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>Theory of Change: The beginning of making a difference is a short NPC paper that 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>Sample questionnaires and guidance for designing them</p>	<p>Inspiring Impact – Impact Hub and specifically surveys and questionnaires</p>
<p>Output and outcome indicator examples</p>	<p>Keeping on Track: A guide to setting and using indicators is a CES booklet that provides a step-by-step guide to setting and using indicators. 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>Evaluation Support Guide 2.1 Developing and Using Indicators is at of guidelines from Evaluation Support Scotland detailing what indicators are, how to develop them and how to use them with several practical examples.</p>
<p>Developing a plan</p>	<p>Describe the Difference Your Work Makes is a CES guide designed to help organisations plan for evaluation more effectively using a monitoring and evaluation framework. The foundations of the framework are built through using the CES Planning Triangle – a</p>



simple tool that helps you to reflect on, and clarify, the connections between the work you deliver and the changes that you create.

Sample evaluation frameworks can be downloaded from the CES website: <http://www.ces-vol.org.uk/tools-and-resources/planning-for-monitoring-evaluation/monitoring-evaluation-planning/monitoring-evaluation-framework-template.html>

2. Do

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, and streamlined to your way of working.

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.

To view the guidance for each indicator click the question mark (?) which appears at the end of the indicator text.

2.1. We collect proportionate amounts of evidence from our beneficiaries in order to measure our impact effectively

Data should not be collected for data's sake. Only collect the data you really need. Sometimes, because of limited resources or logistical issues, it might not be desirable or 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.

This criterion is fully met if:

The size and scope of your data collection suits the type of data that you want to collect and is in proportion to your available resources.

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.

2.2. Before using any data collection tools we test (pilot) them to make sure they are fit for our purposes

This criterion looks at the way your organisation manages the quality of the data you collect, by testing out your data collection tools. Tools that you could use might include a survey, interview and focus group guides.

Making sure your tools are fit for purpose involves **piloting** – road testing them for a short period, and amending them if necessary. Trying out the analysis you plan to use on the data that comes from the tools can also help you to identify any design issues. For example, reading through all the comments from a training feedback form and tallying up the most frequent responses means you can check that the questions you are asking give you the type of information you need.

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 different settings, with all the groups that you want to collect data from. The people who are collecting the data will be able to give you the most useful feedback on whether the tool collects the information you want it to and how easy it is to use.

This criterion is fully met if:

You pilot your data collection tools and check with those using the tool whether it needs to be changed. 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:

- Considering the reliability and validity of your tools

Validity - does the tool collect the information that you wanted to collect? Or is it gathering information about something else?

Reliability - does it work equally well with all the groups that you want to collect information from? Can it collect information consistently?

Reviewing your tools periodically to ensure this will help to make sure that the data you collect is robust.

2.3. People are supported to collect data and understand what we need to collect and why

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 might mean accessing training, information resources, and ad hoc support around data collection, making sure that everyone understands how to collect data properly.

It is important to support your team to understand the importance of collecting robust data in a systematic way and the value of this data in terms of organisational learning and accountability to your stakeholders.

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 and why your organisation does this. Also, that 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:

- Including data collection in staff and volunteer 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.

2.4. We make sure that everyone understands why we are collecting information from them 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 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:

- Enabling people to be involved in the evaluation process anonymously

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 remain anonymous. You can offer the opportunity for them to see what you write about them to give their approval to use their name, request changes or stay anonymous.

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

As part of collecting evidence, you might 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.

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
- Not transferred outside the European Economic Area without adequate protection.
- 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.

2.6. Resources for this section

<p>Choosing data collection tools</p>	<p>Assessing Change: Data Collection Methods: Choosing tools for measuring impact is a CES 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>Involving beneficiaries in data collection</p>	<p>Why Bother Involving People in Evaluation is an ESS published workbook to help voluntary organisations to plan why, when and how to involve the people that you work with in evaluation. Good Practice in User Involvement is a Big Lottery document based on a series of good practice examples identified from the evaluation of BIG's Research Grants programme. It offers examples about what has worked for other research projects and is designed to help voluntary organisations with engaging users in the planning and delivery of research. Involve is a think tank that promotes citizenship engagement. It has a series of publications and guidelines to help you to consider how best to engage your beneficiaries.</p>
<p>Collecting data ethically</p>	<p>Research ethics is a set of published guidelines from Social Research Association that set out what ethical practice looks like in research and evaluation.</p>
<p>Storing data respectfully and legally</p>	<p>The Information Commissioner's Office is a website from the Information Commissioner's Office (ICO), 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. This website contains useful guidance for organisations about how to keep personal data in line with the Data Protection Act.</p>

Useful websites

[Inspiring Impact's Impact Hub](#) has a large number of impact and outcome measurement tools and scales.

[Self-evaluation support Evaluation Support Scotland](#) has a series of tools to support groups to run self-evaluation. The site can be accessed at

The Association of Research in the Voluntary and Community Sector has a handbook on community research that has guidelines and templates to support any community group that wishes to run research/ evaluation.

3. Assess

'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 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 how much change might have happened independently of your work.

To view the guidance for each indicator, click the question mark (?) which appears at the end of the indicator text.

3.1. We analyse our 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.

You will need to have systems in place to allow you to store and analyse your data. These may be on paper or using IT such as Microsoft Excel or a project or customer management system, for example.

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 collate and analyse your data looking for patterns.
- Secondly, you will need to interpret the data in the context of your work, trying to explain how and why changes might have happened.

If you have collected information using more than one tool (eg, a survey and interviews) then you will need to synthesise then compare the data from those sources to see whether they support the same conclusions or tell you more about how and why changes 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...

- Comparing different perspectives on change to try and understand why outcomes occur.

For example, if you were working with young people, you might compare data from the young people themselves about outcomes with that from their parents and carers. 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 and will strengthen your findings.

3.2. 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.

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.

3.3. 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. Being able to recognise and describe the role that others play in achieving outcomes for beneficiaries is an important part of data analysis.

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 information from beneficiaries about how other people support or undermine change

Asking beneficiaries directly about who else they have been accessing support from or other factors that may have helped or hindered their will help you to develop a basic understanding of attribution.

3.4. Resources for this section

<p>Using IT systems to input and analyse data quickly and easily</p>	<p>Inspiring Impact’s Impact Hub lists database and case management sources for voluntary organisations. ESS Support Guide 3.1 - Analysing Information for Evaluation is a set of guidelines from Evaluation Support Scotland that sets out how to analyse data, including numbers, narrative and visual materials. ARVAC’s Getting Started has a chapter on data analysis for voluntary organisations that will support you through a step by step approach.</p>
<p>Useful websites</p>	<p>Managing ICT is a section on the NCVO website dedicated to effective ICT for voluntary organisations. This includes information on budgeting for and buying a system, training and support, and planning for IT. There are also a number of resources to download such as ICT publications, research, and blogs.</p>

4. Review

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, 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.

To view the guidance for each indicator, click the question mark (?) which appears at the end of the indicator text.

4.1. We are open about our findings and share the results within and beyond our organisation

This criterion looks at the way you share your findings with key people outside of your organisation, including funders, commissioners and the public. It also looks at the way you feedback 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 communicate the findings widely. This could be through your annual report, your website or by talking at events or meetings.

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.

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
- Details of who took part (your sample) and how you decided this
- 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...

- 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 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 amending 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 help you review, and to re-set, realistic and achievable targets

Once you have an understanding about which areas of your work make the most difference to beneficiaries, you may decide to adjust your output and outcome targets, and to set targets for future work that are realistic and achievable.

- Costing future impact practice into funding bids

In order to build your impact practice, you may need to invest in things such as IT systems, database systems, training, and potentially external consultant support, for example. There are many funders who encourage applicants to include impact practice and evaluation costs in their funding applications.

4.4. Resources for this section

Feeding back your findings

[Putting the Code into Practice](#) is an Inspiring Impact report containing examples of how other organisations have shared their findings.

Using your findings to improve the way you work

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

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.

Impact

The broad or longer-term effects of a project or organisation's work (also referred to as the difference it makes). 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.

Impact practice

The activities that an organisation does to focus on its impact. This can include planning desired impact, planning how to measure it, collecting information about it, making sense of that information, communicating it and learning from it.

Indicator

Well-defined information which shows whether or not 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, products and activities provided by an organisation.

Outputs

The services and products provided by an organisation.

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.

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

What users think of activities, products or services. For example, the location, opening hours or how helpful workers are.