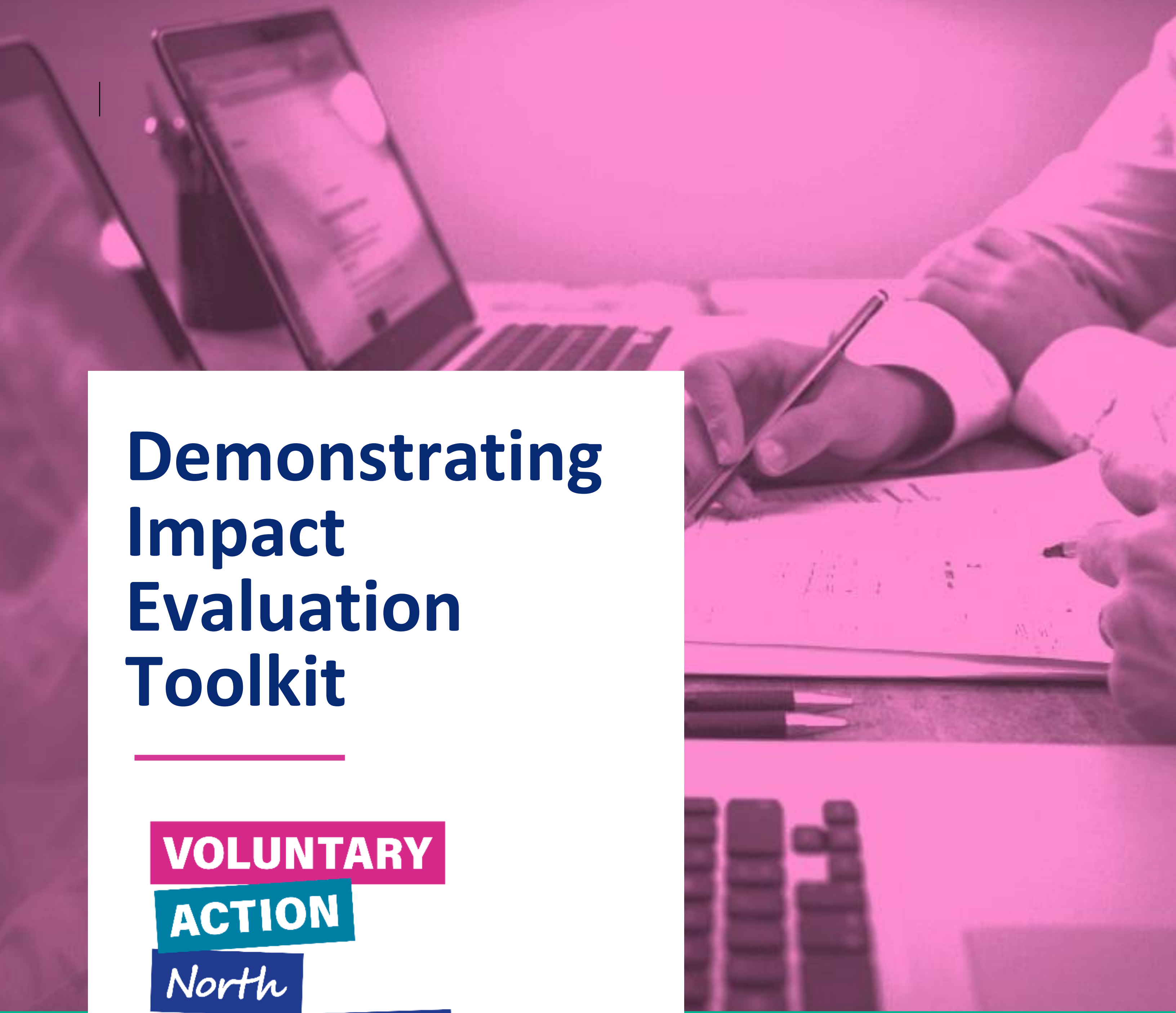


Demonstrating Impact Evaluation Toolkit

VOLUNTARY ACTION North Lanarkshire

Voluntary Action North Lanarkshire

February 2025

Working Together FOR A BETTER North Lanarkshire

Contents

Introduction

Voluntary Action North Lanarkshire (VANL) recognise the massive contribution that organisations in North Lanarkshire's Community and Voluntary (NL CVS) sector makes to improving and expanding the sector by supporting their community and providing essential services. We are producing this toolkit to support these organisations to get the most out of their evaluations by furthering learning and development, with a view to strengthen the Community and Voluntary sector in North Lanarkshire more broadly. With this toolkit, we are trying to simplify evaluation by providing relevant supportive resources and materials.

Who is this toolkit for?

This toolkit has been designed for organisations in North Lanarkshire's Community and Voluntary sector. It is intended to support organisations to develop their skills in undertaking effective evaluations and to demonstrate their impact upon our community.

Who is publishing this toolkit?

All resources provided in this guide have been reviewed by the author: **Rebecca Thomson**, **Senior Evaluation Officer** at **Voluntary Action North Lanarkshire**.

Why Do We Evaluate?

Evaluation is a useful tool for organisations in the Community and Voluntary sector, as it can enhance the impact of our projects, activities and services for our service users, our organisation and the sector generally. It is a way of gathering evidence and analysing it, which enables us to understand what we've achieved and how we can improve.

Evaluation has many benefits as an organisation…

- Evaluation supports learning and improvement which can inform future projects and improve a service for its users
- Evaluation allows you to track the progress of a project: it can tell us how the project is achieving its aims and objectives, and what is not working
- Evaluation makes us more accountable to important stakeholders like funders and service users
- Evaluation can help to secure new funding by demonstrating a project's impact and success

And as a sector…

- Evaluation contributes to strengthening the Community and Voluntary sector by encouraging and sharing learning and improvement
- Evaluation can provide evidence which can inform future policy

Evaluating for Sustainability

Evaluation can improve our sustainability as an organisation, and as a sector.
Sustainability is about **organisational resilience and development** (the ability of an organisation to anticipate, respond and adapt to change to survive) and development (the systematic implementation of interventions for improvement). At the same time, Sustainability is **about more than money, and organisation survival:** it is about things like building and sustaining relationships, understanding the need for your work, communicating effectiveness, and involving people (partners, people you serve, volunteers, board).

At VANL, we are a provider of the Lasting Difference, as we are committed to improving sustainability for CVS organisations in North Lanarkshire.

How is Evaluation Done?

Approaches to Evaluation

There are two main approaches to evaluation**:**

The first approach to evaluation is done in the early stages. It is done as you develop the project and builds evaluation into your activities from the beginning. This is known as a formative approach. A formative approach typically focuses on making improvements, and ensuring that a project/service is feasible, proportionate, and appropriate.

The second approach to evaluation is done during and after the project/service is delivered. This is known as a summative approach. A summative approach is about summarising and reviewing data about whether you have achieved your outcomes.

Although they use the example of school pupils, this article explains the difference between formative and summative evaluation in more depth.

When evaluation is well planned and implemented from the beginning, evaluation becomes a simpler and more effective task. To make the most of your evaluative activities, we encourage that you integrate evaluation into the everyday workings of your project from the start. Doing so enhances the contributions of evaluative activities to learning and improvement. Therefore, we encourage adopting a formative approach to evaluation.

Evaluation Support Scotland provide their 'Making It Stick' tool to help you assess how well evaluation is embedded in your organisation. Along with the Making it Stick tool, they also provide the Self Evaluation health check, to help you reflect on the skills, knowledge and systems you need to evaluate your organisation or project. They provide more resources about embedding evaluation here.

Types of Data

Data is any information collected about all of the activities you do as an organisation. Everything that you collect can be used as data to analyse and learn from.

There are two types of data you can collect when doing evaluative research:

The first type of data is **numerical and statistical**. It is data which can be counted or measured easily. This is known as quantitative data. It can be things like amounts, measurements, or figures. Quantitative data is useful for making generalisations and tracking patterns.

The second type of data is **descriptive.** It is data which involves words and meaning. This is known as qualitative data. It is things like opinions, stories, or descriptions which cannot be easily reduced to numbers or quantified. Qualitative data is useful for providing more detail about individual experiences and human behaviour.

This article by Full Story on Qualitative vs Quantitative data offers a more detailed explanation of the two types of data.

What Data to Collect?

You should think about the data you are capturing already. For example, you might already be in the habit of creating spreadsheets or databases that show things like attendance information for activities, or demographic information for service users that can be used as data. It is a good idea to maintain these systems and databases throughout the delivery of a project to make data collection and analysis easier.

Existing data will not capture everything you want to know, so you should think about what new data you want to collect. What new data you want to collect should be informed by your outcomes and indicators, but it is also a good idea to try to collect more than just outcome measurement data (data specifically collected to measure the outcomes you have set) to capture a fuller picture of your activities. For example, you can also collect data about your processes, or reach data for your activities.

Outputs

Outputs (or sometimes just 'activities') are the activities you do to help achieve your outcomes. Although they sound similar, outputs should not be confused with outcomes. The former is our actions, the latter is our desired actions.

Designing Your Evaluation

Proportionality

Your evaluation should be proportionate to your activities. A proportionate evaluation means that your evaluative activities should be appropriate for the size, scope and level of risk involved in the project or service you are evaluating. Making sure that your evaluative activities are proportionate to what you are evaluating increases the effectiveness of your evaluation and avoids wasting resources like time and money.

Some things to consider when planning your evaluation to ensure it is proportionate are:

- **Time:** How much time do you have to complete your evaluation?
  Consider when your deadlines are. How often are you going to re-evaluate this project?
- **Cost:** How much do you have to spend on your evaluation?
- **Other resources:** what resources (other than money) do you have to carry out the evaluation? e.g.
- **Collaboration:** identify who has an interest or stake in the evaluation. Who will want to see your finalised evaluation and what will they want from the evaluation?

Aims

The aim(s) of a project is a brief description of its goals or intentions. An aim describes what you are trying to do and explains why the project exists. You should know the aims of the project/activity/service you are going to evaluate, as an effective evaluation will measure how the project has addressed its aims.

For example, the Community Solutions Programme aims are to improve people's quality of life and wellbeing by taking action which:

- strengthens social connection and support, helping to reduce isolation and loneliness
- promotes equality and human rights and reduces inequalities

Outcomes

Once you've clarified the aims of your project, you can set your outcomes. Outcomes are the changes or differences that you expect your project to make. Your outcomes are used to determine what evidence you need to collect and are your tools for measuring impact. Outcomes should be as clear and concise as possible; they can also be refined over time.

To figure out your outcomes, you might ask yourself, what problem are we trying to solve with this project/activity/service? Your project may already have defined outcomes before you start to think about evaluation. For example, a potential outcome might be 'people feel more connected, included, and safe.'

This Evaluation Support Scotland support guide is useful for understanding what outcomes are, and how to set them.

Evaluation Support Scotland also provides the following short videos which explain outcomes:

What Is An Outcome? [Video]:
How to Write an Outcome [Video]:

There are also existing tools to help you measure outcomes.

One useful tool for measuring mental health and wellbeing related outcomes is the Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS).

The Warwick-Edinburgh Mental Wellbeing Scale was developed to monitor mental wellbeing in the general population, to evaluate projects, programmes and policies which aim to improve mental wellbeing. To use the WEBWBS, you are required to register on their website.

Indicators

For each of your outcomes, you should set some indicators. Indicators are performance measures; they are the things you measure to find out if you have made the changes you hoped. Your indicators will determine how you capture data and what you capture.

This Evaluation Support Scotland support guide is helpful in learning what indicators are, and how to go about setting them: Evaluation Support Scotland also provide the following videos which explain what indicators are and how we use them to measure.

What Is An Indicator? [Video]:
Working Out What To Measure [Video]:

Planning Tools

Using a planning tool can help to structure and plan your evaluation. Planning tools can help you to figure out what changes your work is making, and give your evaluation direction. They can also help you figure out your aims, objectives, and indicators, what data to collect and how to collect it.

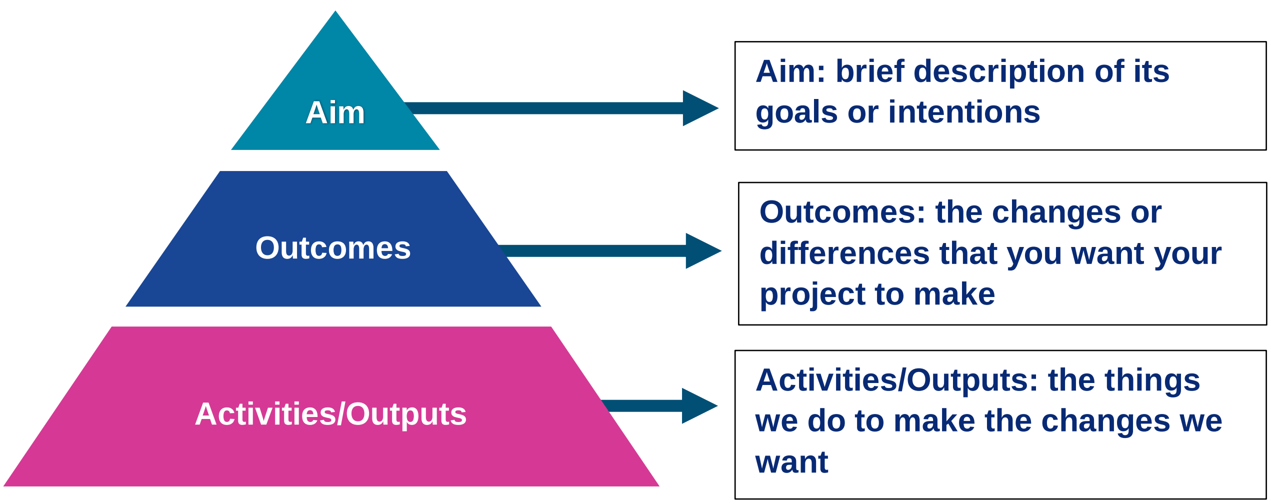
The Planning Triangle

A planning triangle is another simple planning tool which can help you to reflect on and present the difference your work has made. A planning triangle is ideally used for a single project, and allows you to make connections between the aims, outcomes, and outputs.

For guidance on how to use planning triangle, please see the following advice from the National Council for Voluntary Organisations (NCVO):

NCVO: How to Create Planning Triangle

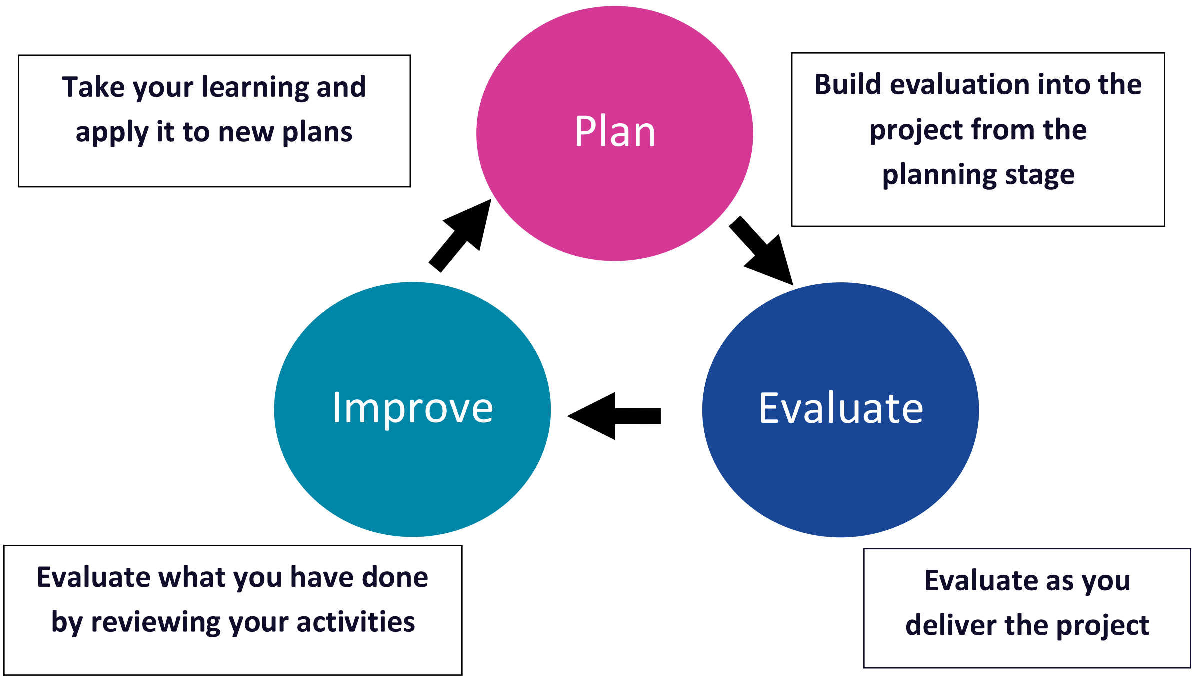
A planning triangle might look like the example below:



The Plan, Do, Review Cycle

The Plan, Do, Review Cycle is an approach which builds evaluation into your activities from their conception. The cycle involves planning the project with evaluation in mind, testing out the ideas, reflecting on what you have done to make changes. Using the cycle is beneficial as it prioritises evaluation, and produces practical knowledge rooted in the experiences of those involved in the project.

A typical Plan, Do, Review Cycle may resemble the below infographic

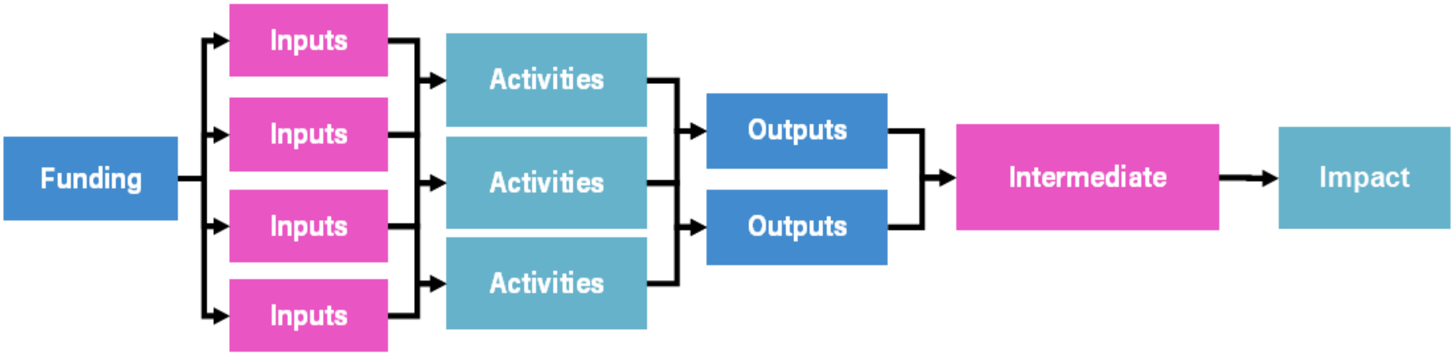


Theories of Change

A theory of change is an explanation of why you believe your project will lead to positive outcomes. It is a process of reflecting on our aims, to theorise how our activities will lead to the outcomes and impact we want to achieve. A theory of change can help to plan your activity in an evidence-informed way. It can also help you to figure out what and when to evaluate.

A well thought out theory of change will effectively support and guide your evaluation
For more information on theories of change, please see the following guidance:
[Analytics in Action: What is a Theory of Change?]
[Theory of Change: Ten Steps]

A theory of change might look like the below example:



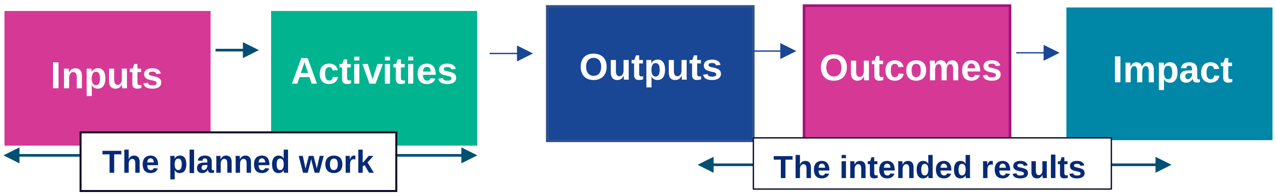
Logic Model

A logic model is another visual way to present how your project will lead to positive outcomes. The model sets out how your activity produces its outcomes and assesses what impact it has made. Logic models can aid evaluation by providing a picture of how your project is intended to work by identifying the main components such as the outcomes, activities, inputs, etc. Logic models can be made more complex, or simpler depending on the complexity of the project.

For guidance on how to use logic models, please see the following support guide and template from Evaluation Support Scotland:

Evaluation Support Scotland Support Guide: Developing a Logic Model
Evaluation Support Scotland Evaluation Tool: Interactive Logic Model Template

A logic model might look like the below example.



Comparing Theories of Change and Logic Models

There are many similarities between a Theory of Change and a Logic Model. They have a similar function of mapping out your evaluation: the resources you need, your activities, and your intended outcomes and impact.

This article by Analytics in Action goes into more detail about the two models. It explains the similarities and differences between the two, and can help you to decide which to use.

Choosing the Method

Once you have decided what you want to measure, you need to decide what method is best suited to measure your outcomes and indicators.

The following are resources to help you choose the right method:

- Evaluation Support Scotland's video on 'Choosing the Right Evaluation Method' gives a straightforward explanation on how to choose your methods.
- They also provide an Evaluation Planning Template, which can help you work out how you are going to collect information to measure your indicators.

You will need to consider what indicators you need to collect qualitative data for, and which need quantitative. The different types of data require different data collection methods. This guide by London School of Economics and Political Science (LSE) on 'When is it better to do qualitative or quantitative research?' can help you decide whether it is qualitative or quantitative data you should be collecting.

Quantitative Methods

Quantitative methods are methods which produce quantitative data. Quantitative data is numerical or statistical data which can be counted or measured. Quantitative methods we suggest using are to analyse existing data, or questionnaires.

Focus Groups

Focus groups are small group discussions (with typically no more than 8 participants), guided by a moderator. The moderator will typically decide the topic and set some questions before the group meets, and then host an informal discussion.

Focus groups are useful for investigating people's perceptions, opinions, beliefs, and attitudes. They are useful as they offer a variety of perspectives in one setting. The interaction between participations in focus groups can sometimes encourage discussion more than in an interview setting.

This guide from Citizen's Advice 'How to Run a Focus Group' provides a comprehensive look at in what situations we might choose to run a focus group, and gives useful and detailed advice on how to successfully run a focus group:
Evaluation Support Scotland 'Focus Groups' document provides an overview of the process of conducting focus groups, giving the case study example of the Oban Youth Group Focus Group Plan:
The Infed.org 'Using Focus Groups in Evaluation and Research' Document also explains the process of leading a focus group.

Interviews

Interviews are typically one-on-one discussions between an interviewee and an interviewer, where the interviewer asks the participant a range of questions about their experiences. They are useful for finding out in-depth information about an individual's beliefs, opinions, and experiences. Some service users may feel more comfortable being asked about their experiences in an interview setting, rather than in front of a group.

The structure for interview questions can be structured, semi-structured or unstructured. This means that the interviewer will either consistently ask the same pre-planned questions to each interviewee (structured), they will ask some questions they have pre-planned and some which come up in the moment (semi-structured), or they will have an idea of what they want to talk about and go with the flow of the conversation (unstructured). Whilst all 3 interview structures are valuable methods for measuring indicators, semi-structured interviews are most beneficial in gathering standardised responses about a project, whilst also having the flexibility to follow up on other interesting points the interviewee makes.

The following resources explain why and how to conduct successful interviews:

Evaluation Support Scotland Guide: Interviews

A Short Guide to Conducting Research Interviews

Observation

Sometimes it will be possible to gather information simply through observing activities. Observation involves watching and making notes about what is going on. It can be done by more than one observer at once, who can then compare notes afterwards. As an observer, you may choose to also be involved in the activity, or to be a bystander and simply observe the activity.

With observation, you should avoid making assumptions about things you cannot confirm. For example, you cannot observe someone's opinion on a project unless they tell you directly. However, you can observe if they are engaging with an activity e.g. are they are getting involved?

The following resource explains why and how to conduct successful observations:

Evaluation Support Scotland Guide: Observation

Analysing Data

Once you have collected your data, you need to analyse it. Analysis is about drawing conclusions from your data. Analysing your data will let you see the extent to which you have achieved your outcomes, what impact you have made, and what other information you have found out. Analysis is about identifying your evidence, finding connections, and coming to conclusions about what happened and why.

The Evaluation Support Scotland Support Guide 'Analysing Information for Evaluation' covers how to do both qualitative and quantitative analysis.

Analysing Qualitative Data

With qualitative data, analysis will involve analysing the descriptive information you have gathered.

The NCVO 'How to Analyse Qualitative Data for Evaluation' guide gives advice on how to analyse qualitative data.

If you have a large amount of qualitative data to analyse, you might want to use analysis software to help you. Evaluation Support Scotland recommends using Quirkos for this. Quirkos is a qualitative analysis software which allows you to visually analyse data and present your findings. Quirkos has a one-off purchase cost.

Sharing Your Learning

Why share your learning?

There are many benefits to sharing your learning with others. Sharing the results of your evaluation can:

- Help to demonstrate the impact of your activities to stakeholders
- Help to secure further funding
- Inspire improvements & change for future work
- Inspire and help others with their own work
- Tell people about the great work that you're doing

Who should you share your learning with?

When you're thinking about who to share your learning with, think about who has an interest or stake in the work. Who was involved in the delivery, funding, and planning?

Internally
- Employees
- Volunteers

Externally
- Funders
- Service Users/the Public
- Other CVS organisations

What is the best way to share your learning?

The different stakeholders who have an interest in your work will want to know different information, in different formats. You should think about what your different audiences need to know, and how they are best reached?

There are many different wants to share your learning. You can use one or more methods.

Sharing Learning in Writing

It is important that even when you are sharing your learning in person, you should have something in writing to keep record of your work, and to guide your audio presentations. Some potential methods of sharing your learning through writing are:

Stories and case studies

One way of sharing your learning is as a case study. A case study is an in-depth report of one person, group, or event. You can use both quantitative and qualitative data to talk about one example in a case study.

You should remember that you cannot generalise findings from a case study. They are used to go into depth about what has worked, and the impact in one case.
The following links are resources on how to present your findings as case studies:
Evaluation Support Scotland Support Guide: Writing Case Studies
A Monitoring and Evaluation Toolkit: Case Study

On the Community Solutions website, you can find our own PMELI Guidance on Preparing Case Studies and Guidance on Preparing Personal Stories, as well as examples of case studies submitted by previously funded projects.

Reports

Another way to share your learning is through writing reports. If you are producing a report for your stakeholders, check if they have requirements or a format they want you to follow.

If you need guidance on how to write a report, Evaluation Support Scotland provide a Report Writing Support Guide. They also provide a Reporting Template which can help you structure your report.

Articles and Blogs

Another written way to share your learning is through writing articles or blogs. These may vary in style, length, and content depending on where your writing is shared.

For guidance on how to write successful articles, see here.
For guidance on how to write effective blog posts, see here.

PowerPoint

You can also share your learning through PowerPoint presentation. This method combines written and face-to-face elements, and can be engaging and effective.
This article provides guidance on how to present your data in PowerPoint in effective, visual ways.

Enhancing your Writing: Infographics

Infographics are a visual way to enhance how you share your findings. An infographic can include visual elements like text, icons, or diagrams to simply present information in an engaging way. They are eye-catching and easily read.

Canva provide a free platform for making infographics.

Sharing Learning in Person

Meetings, Seminars and Events

You might want to share you learning in meetings, or through seminars and events. If you choose to share your learning in this way you should think about who your audience will be, how to engage with them, and how to present your findings in a simple but interesting way.

For tips on how to present your research findings, see this article by the Directory of Social Change: Communication is key - 5 top tips for sharing your research findings impactfully

For some tips on how to successfully host online events, Eventbrite have a useful guide.

Other Evaluation Toolkits

This toolkit is a brief introductory guide to effective evaluation. We have not covered everything there is to know about evaluation in this toolkit, so if you need more guidance, there are some other evaluation toolkits you can look at:

The Communities Channel Scotland's 'Measuring Your Impact' Toolkit is briefer than our toolkit. It is a list of linked resources which take you through the basics of evaluation to measure the impact of your activities.

The Evaluation Support Scotland's 'A Step by Step Guide to Evaluation' is more comprehensive than our toolkit. It is a step-by-step guide to evaluation. It goes into detail about approaches to monitoring and evaluation.

The NCVO website provides many how-to guides covering a wide range of different topics related to evaluation. The guides are short and simple.

Like our toolkit, the other toolkits we have suggested explore the process of evaluation, and give real life examples of evaluated projects. They are useful when used with our toolkit for understanding what evaluation is and how to do it.

About Us

Voluntary Action North Lanarkshire

VOLUNTARY ACTION North Lanarkshire

This toolkit has been prepared and published by Voluntary Action North Lanarkshire (VANL). Voluntary Action North Lanarkshire (VANL) is the Third Sector Interface for community and voluntary sector organisations in North Lanarkshire.

VANL (SCIO) is registered as Scottish Charity no. SC041224

Your feedback is welcomed! Please contact info@vanl.co.uk or complete our feedback survey
Visit our website at http://www.voluntaryactionnorthlanarkshire.org/