

Assessing Change

Developing and using outcomes monitoring tools

By Diana Parkinson and Avan Wadia for
Charities Evaluation Services

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Background to this guide

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Introduction

What is this guide about?

This guide is a practical handbook to help you identify and develop ways to collect information on the outcomes of your work, that is, to track the difference your work is making. It takes you through the process of deciding whether to design your own monitoring tools or to use one of the many tools that are already available. This guide will help you:

- assess the range of options available
- understand the different methods of data collection available and decide on the methods most appropriate to your work and your information needs
- develop outcomes monitoring tools based on your outcome indicators.

You may already be collecting information on your activities, on the work you do together with other organisations, or on user satisfaction for example (which will often include outcomes information – and often at the same time). So the emphasis is on keeping outcomes monitoring manageable by integrating it with other work processes.

Who is this guide for?

This guide is aimed at voluntary sector organisations. It is particularly relevant for organisations providing direct support to individuals but will also be helpful for other organisations, such as infrastructure organisations or those carrying out campaigning work. The guide focuses on developing tools for collecting information on a variety of outcomes – from changes in people's attitudes or feelings to using educational or skills-base tests, or measuring environmental change.

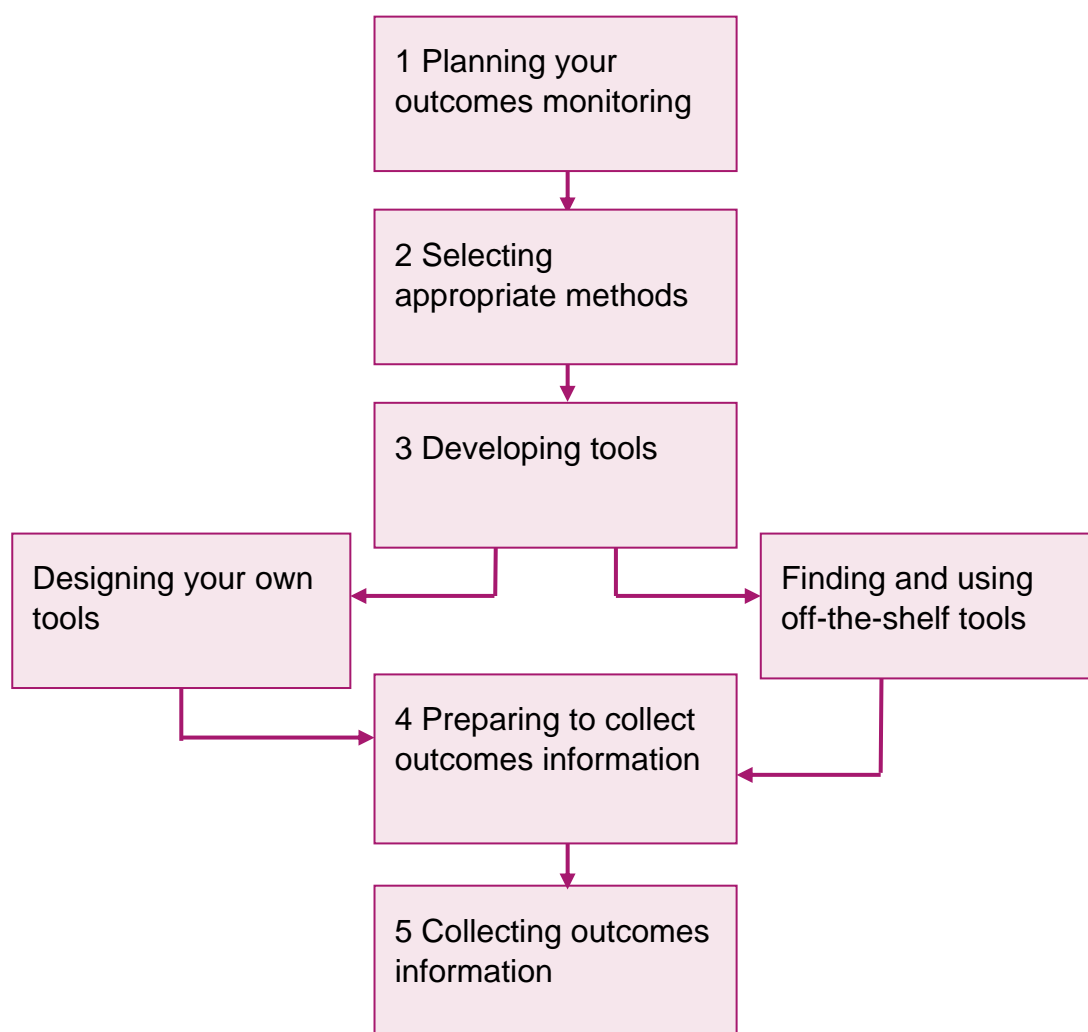
This guide is for organisations that have already identified the outcomes of their work and their relevant indicators and are ready to start collecting outcomes information.

If you need help with identifying your outcomes and indicators, please see *Your Project and its Outcomes*, a free guide available on the CES website (www.ces-vol.org.uk).

How to use this guide

You can choose to dip into the guide to find specific information or you can work through it methodically. The guide is divided into five main sections, as shown in the diagram on the next page:

Diagram 1: A route through the guide



The guide gives information on websites where you can access off-the-shelf outcomes monitoring tools that you may be able to use or learn from. It also contains details of where to find further information and support and a glossary of relevant terms. The guide does not cover how to analyse the data you collect. For further information on analysing data, please see:

Practical Monitoring and Evaluation: A Guide for Voluntary Organisations available from CES.

Analysing outcome information: getting the most from data available on the Urban Institute's website: www.urban.org.

Terms used in this guide

Monitoring is the systematic and routine collection of information.

Outcomes are the significant changes that directly result from your activities. These changes may be for individuals, organisations, communities, policies, practices or the environment. For example, an outcome might be that young people find employment or that more green spaces are provided for local people.

Outcome indicators are the signs or clues that you monitor in order to measure the progress you have made towards your outcomes. They might include the number of young people who find employment; the use of new green spaces; or the level of social activity by older people using the centre.

The term **user** covers the range of people or target groups that organisations work with, such as clients, beneficiaries, customers, communities or other organisations.

A **participant** is an individual or organisation that responds to, or takes part in a monitoring and evaluation activity, such as an interview, a survey or a focus group.

The term **method** describes the different approaches that can be used to collect information on your work, such as surveys or interviews.

An **outcomes monitoring tool** describes the specific device that you develop to collect information on your outcomes, such as an online questionnaire or an interview schedule.

1 Planning your outcomes monitoring

Collecting outcomes information often involves using a combination of different tools – some of which you may design yourself and others you may take from elsewhere. Before you decide which tools to use, it is important to think carefully about what information you want, who to get it from and the best way to get it from them.

It may be tempting to jump straight from ‘*We need to collect information on our outcomes*’ to ‘*We need a questionnaire*’. However, organisations that take time to plan their outcomes monitoring benefit by:

- collecting only the information they actually need and can use
- using methods that are sensitive to the people they want to collect information from
- involving others in the choice and design of their outcomes monitoring tools
- fitting their outcomes data collection into their other work processes.

Before you start planning, make sure that everyone involved understands the basic concepts behind monitoring outcomes.

Understanding outcomes monitoring

We identify outcomes as the changes, benefits, learning or other effects that result from your work. These are distinguished from what you do or produce – your outputs. A useful starting point is to agree who or what you want to affect; your outcomes may be for individuals, families, organisations or communities, or they may mean policy or system change. Remember also that the benefit may be maintenance of a situation which may otherwise worsen.

When you collect outcomes data, you are looking for credible evidence that the benefits have been obtained. This means that you need to rigorously ask the question: *Is this evidence good enough?* You also need to establish a connection between the change or benefits and your intervention, as it is likely that a number of other factors – life changes, natural development, or the activities of other agencies – may also be causing change.

Ideally, you would be able to compare the situation of individuals or groups who have received the intervention with those who have not. (We discuss control and comparison groups further on page 22.) However, for many voluntary organisations it is often too complex and costly to do this. Instead, a comparison is made between the situation before you started the project (or before you started work with an individual, particular groups or communities) and at designated points later on, or after your project is finished.

This means that it is important to get facts about the characteristics of an individual, or of your target group or population, and its context, before you start working with them. This baseline data should be gathered against the same indicators that you will use to assess change, so this means agreeing your expected outcomes and their indicators right at the start.

Even with evidence that things have changed, it may still be difficult to assess what part your intervention played. Getting good baseline data and demonstrating how your activities and services led to change will help you make the connections. You can also ask users and other people how important they perceived the intervention to be in the change. Finally, it is helpful to find out about other potential influences and to acknowledge them.

Assessing your needs

Once you are committed to outcomes monitoring, the first crucial step is to think about the kind of information you need, where you will get the data from and what issues will affect this. Thinking about the outcomes information you want will help you to work out which methods will be most appropriate for your needs. Think about:

- why you want the data and what kind of data you need
- how much data you want and where you will get it
- the type of contact you have with the people who will provide you with the data.

The data you want

Purpose

Ask yourself what you are going to do with the data you collect and who it is for. Outcomes information can serve multiple purposes, such as helping you to:

- reflect on and develop your work
- report to your funders
- identify gaps in your services
- bid for new work.

How you use outcomes information will influence when and how often you need to collect data. Being clear about this will help you identify suitable collection methods.

The type of data

Your outcome indicators specify the precise data you need to collect. It can therefore be useful to set these out in a framework so that you can consider each one in turn and what this will involve.

For example:

Outcome	Outcome indicators	Data collection	When and who by	How you will use this
Young people are more work ready	Level of motivation			
	Level of confidence			
	Number with up-to-date CVs			

Qualitative data is descriptive, most often used for experiences, feelings, impressions or reactions.

Quantitative data is numerical, answering questions such as 'how many?' 'how much?' or 'how often?'

You may be influenced by the need to collect quantitative data for a funder, for example, or you may want to provide qualitative case studies to illustrate the benefits of your work on your website. Generally, it is helpful to collect both qualitative and quantitative data and it will be important to find suitable methods for each.

The depth of data

It is also important to think about the depth and detail of information you want to report, as it will dictate the type of data you collect. Sometimes you may only want to make broad statements such as:

'87% of our users have taken up new activities.'

'Local residents say their park is much cleaner.'

Other times, you may want to give more detailed information:

'43% of our users are now going to the gym and 44% are now swimming at least once a week.'

Or you may want to provide more in-depth information:

'89% of the local residents we consulted said there is less litter in the park. Several said that the new rubbish bins had made a difference. Others felt that people were aware of the clean-up campaign and were making an effort to take litter home or throw it away.'

Think about how much detail you want when choosing your methods. For example, questionnaires and surveys are useful for getting the same data

from each respondent, and giving you quantitative data, but are less useful for providing a consistent level of in-depth information.

How quickly outcomes occur

The rate at which outcomes occur is also relevant to your choice of method. Some outcomes happen quickly (for example people increasing their skills during a training course) and evidence of these outcomes may need to be captured at the time. Others happen over a much longer period of time (for example young people becoming ready to live independently) and the methods you use will need to take account of this.

The sensitivity of the information

The sensitivity of the information you wish to collect is also likely to affect the way in which you collect it. For example, if you want to ask someone personal questions about their mental health, you should think whether an interview or a questionnaire would be most suitable.

Sources of information

Collecting outcomes information will involve identifying a range of people and sources from which to collect data.

Primary data is new data that is collected specifically for a particular study. For example, a campaign to reduce waste may carry out a household survey to find out the effects of the campaign on recycling habits.

To collect primary data, you will need to:

- ask your users for data by using questionnaires, interviews, tests or other methods
- record data about people or situations, for example making case notes
- observe and record people or situations, for example, how a group of users develop team-working skills.

Secondary data is data collected for purposes other than your study, such as local police crime figures, or school exam results, which provide you with information on your outcomes. Collecting secondary data involves looking at other people's research, reports or statistics. If you are a campaigning organisation, much of your outcomes data may come from secondary, documentary sources, such as articles in the media, government papers and publications.

Triangulation

A number of different sources can provide more evidence of changes in the individuals or situations your work affects. These sources might

include school teachers or other professionals, people who live in the local area or family members of your users. It could also mean getting test results, or diary evidence, as well as personal feedback. Getting information from other sources is helpful as it:

- can provide an external perspective
- strengthens the data you collect
- can help organisations build relationships with other stakeholders.

However, be aware that:

- other people may not know enough to be able to give you meaningful information
- different people may collect data or provide information in different ways resulting in inconsistency
- people may not want to share data with you.

Make sure your methods are appropriate for your stakeholders if you are asking them to collect data for you. You will need to agree with them what they are responsible for and make sure they are committed to it.

Scope

Deciding the scope of your data collection (such as the number of people you contact or the number of records you use) helps to keep your outcomes monitoring manageable.

It may be possible for you to obtain data from all your users, particularly if you integrate the collection of this data with your regular activities. However, it may only be possible to obtain data from some of the people you work with (particularly if you work with large numbers). [Section 4, *Preparing to collect information*](#), provides more information on using samples and snapshots.

Type of contact

The method you choose will also be affected by the type of contact you have with those providing you with outcomes data (your users, target audience or other stakeholders). Consider the following:

- Do you have direct, face-to-face contact with them or indirect contact, such as over the telephone or by email?
- Do you have contact details for them? If you provide an anonymous or confidential service, you may only know first names.
- Do you have individual contact with them or only in groups?
- Do you have regular contact with them or do you only see them once?

Regular contact with your users will enable you to collect outcomes data as part of your ongoing work. However, if you only have one-off contact

with people, you will have to ask them to compare how things were for them before and after they received your services.

Assessing your resources

Selecting appropriate methods for collecting information on your outcomes also involves looking at your organisation's resources and ways of working.

Budget

Some of the costs associated with the development of outcomes monitoring are obvious, such as:

- buying a particular outcomes tool
- hiring a venue to hold a focus group
- renting or buying cameras or recording equipment.

Other costs may be less obvious, such as:

- the time taken by staff to develop and pilot tools
- the postage for a survey or the cost of telephone calls for interviews.

Think about what resources your organisation can realistically devote to developing and carrying out outcomes monitoring and include this in your organisation's budget. These resources should be found from your core budget or raised from additional fundraising.

Time and skills

You will also need to think about the time and skills needed for monitoring. In the short term, the work may involve:

- researching appropriate outcomes monitoring tools
- adapting or designing tools
- pilot testing tools.

In the longer term, you may need additional support such as an external consultant, or volunteers to collect, input and analyse information.

IT resources

It is also helpful to bear in mind your organisation's IT resources. For example, do you have enough computers for all your staff to enter data? Or do you need to buy a licence for an online tool or specific software for monitoring and analysis?

For further information on developing an information system, see CES' guide, *Using ICT to improve your monitoring and evaluation*.

Organisational values

Finally, consider how your organisational values could affect how you choose and develop your outcomes monitoring tools. For example, an organisation with a policy on staff and user involvement will want to think about how to involve their staff, volunteers and users in selecting and implementing an appropriate outcomes assessment method.

Summary

The first step in working out how to collect information on your outcomes involves assessing the needs and resources of your organisation. Think about:

- the type of data you need to collect
- your contact with those who will provide data
- what resources you have to support this work
- what organisational values you need to take account of.

2 Selecting appropriate methods

Once you have assessed your needs and resources, the next step is to decide which methods to use. There are many ways of collecting information on the outcomes of your work.

The main options are:

- Interviews
- Self-completion tools
- Group activities
- Observation
- Visual methods
- Social media

This section gives you an overview of each method and the advantages and disadvantages of using each one for collecting outcomes information. [Section 3, *Developing your tools*](#), provides information on designing specific tools or using off-the-shelf-tools based on these methods.

Data collection methods

Interviews

Interviews are a way of asking a set of questions to individuals either face-to-face or on the telephone¹. They can be:

- structured, where questions are pre-set questions and use exact wording
- semi-structured, where questioning is more flexible, allowing for a more fluid, responsive and probing interview
- unstructured, where the interviewer begins by asking a general question and then encourages the interviewee to talk freely
- combined with other methods such as drawings or mind maps to engage interviewees.

Interviews can be a good way of collecting outcomes information because they allow you to:

- ask people directly about how things have changed for them
- collect in-depth information about changes in attitudes, feelings and perceptions
- collect information from people who are not literate or are visually impaired
- check that people understand your questions
- respond to unexpected information and probe further.

¹ Interviews can also be carried out with groups of people – this is covered under ‘Group activities’ later in this section.

Your resources may limit the number of people you can interview and get feedback from. Also be aware that interviews:

- can be time-consuming to set up, carry out, write up and analyse
- can generate a lot of data which may be difficult to record accurately if not using a recording device
- may entail extra costs such as telephone charges or transcription costs
- cannot be carried out completely anonymously although you can assure interviewees of confidentiality.

The quality of the data may also be influenced by the interviewer's own bias and skills or the differences between interviewers.

Self-completion tools

Self-completion tools are used to collect data directly from people themselves and include questionnaires, surveys, tests, forms and diaries.

Questionnaires and surveys

Questionnaires and surveys are a way of collecting information in a standardised way from a group of people. They can be produced in paper format or online, such as:

- a feedback form at the end of a parenting programme to ask parents about changes in the way they communicate with their children
- an online survey to young people to find out whether they have accessed further careers advice following a careers workshop.

Questionnaires and surveys are useful for collecting outcomes information because you can collect information from large numbers of people. They also allow respondents to remain anonymous. They are particularly good for collecting information about people's opinions and attitudes in a quantifiable way as they lend themselves well to using scaled questions.

Online questionnaires offer the advantage of being relatively cheap, do not require data entry and usually provide facilities to analyse the data.

However, bear in mind that:

- questionnaires and surveys usually require some literacy
- response rates can be low
- respondents may not answer some questions
- you cannot check that respondents have understood questions
- they are not ideal for collecting in-depth data.

Tests and forms

You can also assess change by asking users to take a written or practical test. Written tests are a good way of assessing changes in people's skills, for example someone's English language skills.

Forms can also be used to ask users questions about changes in their circumstances, behaviour or attitudes. For example, an organisation working with young people asks users to fill in an application form when they join their training programme. The form includes questions about their current situation regarding housing, finances and employment.

Diaries

Diaries allow people to keep individual records of their experiences, feelings and thoughts. They can be in the form of pre-set questionnaires focusing on a series of key themes or blank pages for people to fill in as they wish. For example, a diary can be given to people recovering from a stroke to record their progress. Or young children can be encouraged to keep a diary of the amount of fruit they eat everyday – they can cut out and stick pictures in it or draw the number and type of different fruit they eat.

Diaries can be a good way of collecting outcomes information as they:

- can capture details of change on a day-to-day or weekly basis
- enable respondents to remain anonymous as data can be recorded against a code rather than a name
- are particularly useful for collecting in-depth outcomes information
- can collect both qualitative and quantitative data
- can yield rich, personal information.

Diaries are usually used in combination with other methods, for example interviews to clarify or check information emerging from the diary record. Bear in mind that:

- It may be difficult for users to keep their diaries over a long period of time.
- Users may not complete the diaries thoroughly enough to provide the information you need.
- Written diaries require literacy.
- It can be time consuming to extract and analyse outcomes information from diaries.

Group activities

Group activities are used to bring together a group of people to talk about specific issues. They can be structured or fairly open and flexible and include:

- **Focus groups.** These are based on a limited number of questions around a central topic. They can help to set your evaluation questions and can be used to explore particular issues. The facilitator's role is important, as he or she moves the discussion on when appropriate and makes sure that the group stays on track.
- **Group interviews.** These are usually semi-structured and conducted by an interviewer. They have all the characteristics of a one-to-one interview but are usually conducted with a small group of people (maximum of three to four).
- **Group discussions.** These can be carried out with a larger group of people, can be more flexible and use interactive exercises which give more control to the participants.
- **Interactive exercises.** Examples of these include activities such as a 'walk and talk' exercise where participants move around the room in small groups, stopping to discuss a question written on a piece of flipchart on the wall. Their collective responses are then written on the flipchart.

Group activities are useful for collecting outcomes information when participants have a shared experience of outcomes. They:

- can give you lots of qualitative data
- allow participants to spark off each other and generate ideas
- provide an opportunity to explore issues that emerge from discussion.

However, group activities are not good for seeking sensitive information and you have to carefully manage situations where individuals may dominate the group. They can also be time-intensive in terms of organising, carrying out and then writing up and analysing the data collected.

Observation

Observation involves studying and recording information on changes you see, hear or experience. These changes can be in people's behaviour, attitude or appearance or changes in situations. Observation is useful for collecting information on:

- individual change that is difficult to assess through other means, for example, assessing someone's presentation skills by observing them deliver a mock presentation
- people who might find it hard to talk, for example children with learning disabilities

- group behaviour, for example young people from different groups talking to each other more
- changes in the environment, for example the reduction of litter on an estate.

Observation can be carried out formally, where it is directed through a set of structured criteria or indicators or informally, where information is recorded in a more ad-hoc way. For example:

- A campaign for improving cycling routes wants to record any increase in the use of the improved route. They can do this by using volunteers to record the number of cyclists going past with a click-counter or by filling in a form detailing the days and times cyclists use the route.
- A teacher notices that a young person with learning difficulties has approached a group of other young people to ask if he can play football with them. This sign of increased confidence is significant and should be recorded.

Frontline workers and volunteers may observe and record changes they see or experience with people they work with, often in case notes or individual assessment forms. Key workers, for example, may periodically fill in forms recording changes they have observed in clients. Trainers or coaches may record changes in the skills or behaviours they see over a period of time. This may be done as session notes or by ticking a box on a database.

Observation methods have specific advantages. They:

- may identify changes that people themselves are unaware of
- may capture information that other tools miss
- may not rely on verbal communication or specific language skills
- can be integrated into everyday work or contact with users.

However, they can generate a lot of data to analyse and they rely on the skills and objectivity of the observer.

Visual methods

Visual methods can be used to capture outcomes information using photographs, drawings, collages or videos to illustrate or provide evidence of change. They can encourage people to express themselves freely and to collect personal information (for example, through use of a video diary). They are good for collecting qualitative data as they:

- can portray a vivid impression of people's views and experiences
- can be motivating, engaging and fun for participants
- work well with young people and people who cannot complete 'traditional' data collection methods easily.

Visuals can also be incorporated into the design of surveys and forms. The most familiar are smiley face symbols:



They can also be used in group activities. For example, participants can draw on a flipchart or create a collage together, describing the changes illustrated.

Visual methods are also a good way of capturing changes in situations and environments. For example, photographs could show images of a local estate before and after a clean-up sessions, or a campaigning group working on climate change can use photographic evidence to show the number of people holding their banner at a climate change march. However, there are disadvantages:

- Outcomes information may not always be identifiable in images.
- Your funder and others may find visual images less useful or convincing as evidence.
- Visual methods are more effective when integrated into, or working alongside, other data collection methods.

You will need to interpret the visual images, and this can take skill. You may need to explore further with those making the images what they show or what they mean. For example, an interviewer can ask an interviewee to draw a picture which they could then use as a basis for further discussion.

When using photographs, you need to take into account confidentiality issues, and also seek consent by the individuals being photographed. For more details on confidentiality and data protection, please refer to [Section 4, Preparing to collect information](#).

Social media

The term 'social media' describes the different content that is generated by internet users, for example through blogs, podcasts and video storytelling, as well as through social network sites, such as MySpace, Facebook, YouTube and Twitter.

Social media is relatively new to the world of monitoring and evaluation, but is increasingly used by some organisations to collect outcomes data. For example, young people involved in a project can keep blogs serving as diaries which record outcomes, or provide feedback on Facebook or on Twitter. Online video storytelling provides more potential for using visual outcomes evidence. There is online monitoring and reporting software that can allow media files to be uploaded and accessed as part of a report. This can bring your project and its outcomes to life to a wider audience as well as to your actual or potential funders.

One disadvantage of using social media for monitoring purposes is that it may generate a large amount of unstructured data, so you need to plan carefully how it will be captured and analysed around specific indicators.

This question of identifying useful indicators is also important in a second area where social media has monitoring and evaluation potential.

Campaign work is carried out more and more through different digital activity – for example through creating a ‘buzz’ around a blog, or amplifying an event through live web chats or webcasts, or creating online groups. All these activities and discussions online leave a digital trail, which can help you track the influence your organisation or campaign has had.

While you can get statistical data, for example about the number of unique blog readers, comments, or people connected, this does not give you outcomes information. However, if you have the resources and technical expertise, you can look at more than simple numbers of hits on your website. For example, information on the activities of self-managed online communities generated by your campaign could be a relevant indicator of your most immediate outcomes. You may also be able to assess the amount of offline activity that is developed as a result of digital activity during your campaign. For example, these might be:

- the number of friends met online that users have met offline
- the number of friends met online that members have subsequently collaborated with
- the number of ideas that a user has got and then used in their work
- examples of individuals taking some action as a result of blog activity.

Choosing your methods

There are a number of criteria that will influence the methods you choose. They should be:

- robust
- credible
- fit well with the way you work
- fit well with your user group
- provide good outcomes evidence.

Will your methods be robust?

Your data collection tools should give you accurate data that you can trust:

- **They should get information clearly relating to what you want to know.** For example, if you want to know how a new community centre is being used, it may be appropriate to monitor the people using it and

observe its use. If you want to know what difference it has made to people's lives, you will need to ask them.

- **They should ask the right people the relevant questions.** For example, if you are sending a questionnaire to local residents, will it be completed by people who have lived in the area long enough to be able to tell you about any changes?
- **They should give you reliable data.** This means that if you were to repeat the same exercise with the same person or group in the same circumstances, it would give you a consistent result. This means making sure that different interviewers or observers, for example, understand and apply their questions in the same way.

Will they be credible with your stakeholders?

It is important to involve stakeholders as much as possible in the process of selecting the methods you are going to use. Some stakeholders may want to see information that has been directly gathered from users and may be particularly interested in creative, innovative approaches. Others may look for a more 'objective' or traditional approach.

You might want to consider using a tool that has been previously validated in a clinical or academic context.

Validated tools

Validated tools are ones that have been independently tested and shown to measure what they claim to measure. The findings generated by validated tools are generally perceived to carry greater weight as their ability to assess outcomes has been well established. There is further information on validated tools in [Section 3, Finding and using off-the-shelf tools](#).

Will they provide enough evidence?

Whether you have enough and good enough evidence relates in part to how appropriately you choose your indicators, and also in part to the perceived credibility of your data collection method. Getting information from different perspectives will also help you to build a stronger base of evidence. For information on Triangulation see page 10.

For example, a local youth group might use a combination of the following methods:

- feedback after sessions run with participants
- observation notes from youth workers

- school records on truancy and national statistics on truancy.

Similarly, a community centre that runs healthy living activities (from cookery lessons to keep fit classes) could use a combination of the following:

- feedback forms at the end of classes
- annual interviews with participants about fitness levels
- obesity and/or other health related statistics from the local GP.

Even with good data about the situation before and after the intervention, it is difficult to demonstrate that the outcomes are a result of your intervention. To overcome this, evaluations sometimes do a comparison study by setting up a control group.

Comparison groups

A matched comparison group should be the same in all respects – in age, gender and socio-economic factors – other than the fact that one group only receives the intervention. Baseline data and outcomes data should be collected at the same time against the same set of indicators. Any difference in outcomes can then be attributed to the service that has been provided.

However, there is still a problem of knowing that the different groups are really comparable. This can be addressed by randomly assigning individuals from a single defined group to either receive a service or not receive it – the control (as in a drug trial). However, this ‘experimental’ approach may not be appropriate to the delivery of the vast body of voluntary sector projects.

Potential funders and other stakeholders may find the results of an evaluation using a comparison group more persuasive. But although it may give you more credible evidence, it will still be difficult to offer conclusive ‘proof’ of cause and effect. A control group can more easily be set up and monitored in some contexts than others, for example, matching school education years or randomly assigning students to different teaching methods. But many contexts may involve considerable planning and resources and that investment should be set against any potential gains from a control group study.

Summary

Selecting appropriate methods involves taking account of your needs and resources and identifying methods that are:

- feasible in terms of your resources
- appropriate to your work
- robust enough to give your evaluation a sound basis
- credible with your stakeholders
- able to give you the outcomes information you need.

Think about using a mix of different methods and sources in order to strengthen the outcomes data you collect.

3 Developing your tools

Once you have selected your methods, you can explore two options:

- Are there existing tools that would be suitable or that could be adapted?
- Do you want to design your own tools?

Using an off-the-shelf outcomes monitoring tool can be helpful:

- It can save you time.
- It may come with guidelines or even an IT system to support its use.
- It may be a previously tested or validated tool, or may be widely recognised.

It may be also be useful to look at existing tools and adapt them to meet your specific needs. On the other hand, existing tools may not suit your activities, and you may be better served by designing a tool around your specific work and outcomes indicators. The process of designing data collection tools can also allow you to involve staff and users in thinking about your outcomes and how these can be assessed.

First considerations

Whether you decide to develop your own tools or use off-the-shelf tools, it is really important that they are appropriate for your users and cover the indicators you want to monitor. Part of the process of developing or choosing a tool involves thinking about:

- how they will be used for collecting baseline data
- using tools at different points in time
- collecting data once only
- using different tools to complement or supplement each other
- good practice issues.

Collecting baseline data

Baseline data is recorded at the start of an initiative, either before or at the first point of contact with your users. It is important because the outcomes data you collect later can be compared to your baseline data in order to assess the amount of change that has occurred. You should therefore make sure you design your outcomes monitoring processes to collect baseline data as soon as is appropriate and feasible.

Collecting information at different points

Assessing change may also involve collecting information at several points during your work. If you are using tools to collect data at regular points in time, the frequency and timeline should be identified in advance.

Remember that you want to be able to compare data over time, but you may need to adapt your questions to reflect the timing of your information collection.

You need to provide an identifier in order to match responses from the same person (or organisation) over time. If you don't do this, you will be able to provide some indication of progress of a whole group over time, but will be unable to analyse individual change, or provide a more detailed analysis of change according to demographic or other characteristics.

Providing an identifier to personal data could mean putting a name to each record so that they can be matched up. If you want to keep the data anonymous, you should create a user ID and make sure that it is used on each tool each time. For example, if you are repeating a survey, make sure that the ID is inserted on the form before it is sent out. For an online survey, you may require a name in order to match data.

Ideally you want to collect information before, during and after your intervention. However, you may find that you are only able to collect outcomes data from your users after their contact with you. This means that you may need to ask them to compare how things are afterwards with how they were before the intervention. For example, if you are running a helpline service, you can contact them, for example, six weeks and again two months after their call to ask them what difference the call had made.

Combining different tools

It is a good idea to use different methods and sources in order to strengthen the outcomes information you collect. But do consider the following issues:

- **Overload.** Be careful that you do not ask for too much information from the same people.
- **Get comparable data.** If you collect data from different sources based on the same indicators, you will be able to make direct comparisons between the different sets of data that you collect.
- **Match different tools to your indicators.** You may find that different indicators will require different methods and data sources.
- **Use one tool to support another.** For example, a survey could ask respondents if they would be willing to take part in a follow-up telephone interview. Your telephone interview can then explore responses in greater depth.
- **Don't duplicate data.** Make sure that the different tools you use don't ask people for the same data.

- **Don't have too many forms and questionnaires.** People generally don't like filling out too many forms, so try to have a mixture of different methods.

Obtaining consent in advance

You will need to make sure that the people you involve in your evaluation are given an opportunity in advance to make an informed decision about whether to participate. If you are collecting information from children and vulnerable adults, then you will also need to gain consent from their parents or carers. Obtaining informed consent should involve providing information about the following:

- the evaluation and the type of information you will collect
- their participation being voluntary
- their ability to withdraw without harming their relationship with any agencies involved
- privacy issues (for example in focus groups)
- confidentiality
- recording and data storage
- incentive and other payments.

You may want to receive a written agreement to participate where this is possible. This can sometimes be usefully combined with obtaining contact information. See information on Data Protection on [page 49](#).

Designing your own tools

If you have decided to develop your own tools, consider carefully:

- the questions you want to ask and when to ask them
- the design and use of your tools so that they collect outcomes information most effectively
- involving other people.

When involving colleagues and users in the design or selection of a tool remember to:

- allow sufficient time for their input
- be clear about what you want from them and when
- explain how you plan to involve them. Are you simply consulting them or do you want them to help design the tool?

You may also want to talk to similar organisations and see what they have used, as this may help you to design your own monitoring tools.

Writing questions

Most outcomes monitoring tools will include questions to be answered by users, staff or other people you are collecting information from. It is important to spend some time thinking about the questions you want to ask and how best to ask them as this will affect the quality of the data you get back.

Your questions need to relate clearly to the outcomes you wish to monitor, so take each of your outcome indicators in turn and think about how best to express them as questions. For example, if your outcome is 'Young people are more work ready', you may have the following indicators:

- level of motivation to find work
- level of confidence in seeking work.

You could ask:

- *How keen are you to find a job at the moment?* (motivation)
- *How confident do you feel about applying for work?* (confidence).

However, you may get more objective evidence of both motivation and confidence with the following question:

- *What steps are you taking to finding a job?*

You may then ask follow up questions on having a CV ready, or job applications and interviews.

Choosing the type of question

As different types of questions will give you different information, you need to think carefully about the questions you ask. Open questions are useful for providing qualitative data and closed questions will provide more quantitative data, and it is often useful to use a combination of both.

Open questions

Open questions allow people to respond in any way they wish and to explore people's experiences and feelings. For example, '*What difference has our support made to you?*'

The advantages of using open questions are that they:

- allow respondents to answer freely
- may produce detailed responses
- require respondents to think about their answers
- can provide more insight into respondents' true feelings and views
- can produce information on unexpected outcomes.

However, using open questions can also:

- produce unclear responses
- make it hard to categorise the responses
- produce a large amount of data for analysis
- require more effort from respondents resulting in unanswered questions in questionnaires.

Semi-structured and unstructured interviews use open questioning techniques. You may find it useful to expand on questions in surveys and questionnaires providing quantitative data by having some open questions allowing free text and qualitative responses.

Closed questions

Closed questions ask people to select their answer from a pre-determined range of options such as:

- yes/no answers
- multiple choice
- scales.

The advantages of using closed questions are that they:

- are simple and quick to answer
- tend to get a higher response rate
- make it easier to quantify and analyse the responses.

However, closed questions:

- may not give respondents the choices that reflect their real views and feelings
- do not show whether respondents have understood the question or not
- may result in respondents ticking boxes without thinking about their answers
- do not allow respondents to explain responses or raise new issues.

Prompts and probing questions

Prompts and probing questions can be used to get more in-depth information. This will be helpful in providing greater understanding about the extent to which outcomes are being achieved. Probes are sometimes phrased as closed questions. For example, in a questionnaire you might ask, 'If you answered "yes" [to the previous question], how often have you gone out in the last month?'

Prompts can also be phrased as open questions. For example, in an interview you might ask, '*Can you tell me more about that?*' or '*How would*

you describe the difference?’ Open questions allowing for free text are often asked as a supplement to scaled questions in questionnaires and these can provide explanatory data, particularly if they are more focused. Asking a question such as *‘Were there any other ways in which our services helped you?’* may provide information on unexpected outcomes.

Scaled questions

Scaled questions are a type of closed question which allow you to gather information in a structured way. They are particularly helpful for collecting information which can be easily compared across time. Scales can be presented in different ways:

- number scales – for example, rating from one to five
- symbols or pictures – for example, smiley faces
- physical objects – for example, moving counters on a board
- statements for users to agree/disagree with.

For example:

	Strongly agree	Agree	Disagree	Strongly disagree	Not sure
I know how to control my anger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

You can use the same scale and rating to compare across time.

When using scales:

- Avoid using too many different scale types in one monitoring tool.
- Express scale rating consistently from left to right, for example, from 1 to 5 or from positive to negative.
- In most cases, use a scale of between four and seven options (maximum ten).
- You may use a central neutral point, but use an even number of scale points if you want to avoid respondents picking the middle or neutral option.
- Explain each point on a numerical scale as this will help users to understand exactly what you mean and will give you better quality data. It will also be easier to analyse and present.

- Keep questions or statements short, clear and specific.
- Try to group a small number of related questions or statements together (no more than five).
- Make sure the scale you are using works for each item you are asking people to rate.

In questionnaires, remember that some questions or parts of it may not be relevant or appropriate to a respondent. To avoid a non-response, you may need to add 'not applicable' or 'not appropriate' (N/A) to the range of possible answers. You may also choose to allow a 'Don't know' response.

Scaled questions are particularly useful in questionnaires. Simple scaled questions can also be used in an interview to provide quantitative data and provide a lead into more qualitative data.

Writing good questions

Good questions are ones that provide information against your indicators, and that allow unexpected data to emerge. Good questions are also ones that people can understand and are willing and able to answer. Writing good questions is largely about how you phrase them:

- Make sure the language you use is clear and unambiguous.
- Be particularly sensitive when asking personal questions. Scales can be helpful here as they allow respondents to rate pre-defined statements rather than using their own words to describe difficult feelings.
- Avoid using leading questions such as, *'Would you say you ate more fruit than you used to?'* It is better to ask a neutral question such as *'How much fruit do you eat?'*
- Do not ask a question that contains two separate questions within it. For example, *'Has your knowledge on the subject increased and your confidence improved as a result of the course?'*
- Steer clear of any abbreviations, jargon or technical terms.
- Avoid using double negatives, as in the statement: 'I don't feel confident when speaking to my superiors' followed by a response selection of: 'All the time/ Sometimes/ Never'.

- For some questions, it may be useful to specify a time period or suitable timeframe. For example, you might ask ‘*Over the past week, how many times have you gone to the gym?*’

Focusing your questions

As you will be using your monitoring tools to assess your outcomes, the questions they contain will be based on your outcome indicators. However, remember to include questions that will collect other essential data, such as:

- respondents’ profile, for example, their age, gender or ethnicity.
- what services they have received (outputs)
- whether they are satisfied with the services they received (user satisfaction)
- how long they were in contact with the service.

Such data is important to give your outcomes monitoring a context and help you interpret and report outcomes. It will be useful to understand whether the outcomes achieved were influenced by profile issues, by the frequency or length of their contact with the service or whether they were receiving a complementary service from another agency. However, bear in mind that too many questions may limit the quality and quantity of your responses, so focus on the most useful questions.

Ordering your questions

The way you order your questions can affect how people answer them. Try to:

- start with questions that are easy to answer and non-intrusive
- group together questions on the same topic
- order your questions to flow from the more general to the more specific
- intersperse more difficult questions with straightforward ones
- leave profile questions to the end.

Once you have drawn up your set of questions, spend some time reviewing the overall mix of questions to ensure they work together and don’t miss anything out.

Designing specific tools

In the following section you will find information on designing specific tools based on the methods you selected.

Designing interview schedules

Designing an interview schedule takes considerable time and thought. Think carefully about the number of questions you ask and how you order them. Decide whether you want each question to be open or closed and bear in mind that scaled questions should be used sparingly in interviews.

Your interview schedule should:

- focus on the outcomes that you most want to explore in detail
- avoid questions that might be uncomfortable for the interviewee
- suggest appropriate moments where the interviewer should probe further for example, by asking *'Why do you say that?'* or *'Can you tell me more about that?'*
- have a logical flow, with instructions to the interviewer, for example, where appropriate indicating which questions to skip.

Sometimes a supplementary lead-in question for example, will be helpful to introduce a question based on your indicator:

Outcome	Outcome indicator	Interview questions
Increased confidence	How confident users feel when travelling alone on public transport	<ul style="list-style-type: none"> • Have you travelled on your own on public transport in the last month? • How confident did you feel last time you travelled alone?

Starting with questions about the service can relax the interviewee before you ask them outcomes-related questions, but still provide you with useful information. An example could be, *'How did you hear about the centre?'* or *'Was this the first time you had contacted the organisation?'*

The work you do, as well as the nature of the evaluation and the questions you need to ask, is likely to influence who you choose to do the interviews. Some people believe that users are more likely to talk to someone they know and trust, such as a member of staff or peer, while others feel that users may be more honest with an external interviewer. It is also important that your interviewers, whether they are staff, volunteers or peers, are given adequate training and support.

Example interview questions

I'd like to start by asking you if this was the first time you called the helpline?

Did you contact the helpline for yourself or on behalf of someone else?

What prompted you to call the helpline?

How were you feeling when you called the helpline?

How did you feel after you had spoken to them?

How did you follow up on the information or advice they gave you?

Designing questionnaires or surveys

Designing a questionnaire or survey is quite an art. You may be able to get input from relevant frontline staff or volunteers and from users. This will help you cover relevant issues and write questions that are understood and appropriate.

When designing a questionnaire or survey, remember to:

- introduce it and explain its purpose
- clarify whether people can respond anonymously
- keep it as short as possible
- ask questions in a way that people understand
- check the numbering on your questions
- make it clear when participants can skip questions, and signpost clearly to the next question they need to answer
- make sure the layout is clear, dividing longer questionnaires into sections
- provide enough space for answers and use a large font.

Include instructions for return of the questionnaire and the deadline for return or completion of an online survey. Where appropriate include a stamped, addressed envelope or freepost envelope. Online surveys are becoming increasingly popular for target groups likely to access a computer. They can also be printed out and sent to individuals. Some of them are free to use and fairly simple to design. The following tips may be helpful:

- Write the outline of your survey before you start creating it online. This will allow you to think through the questions, the question order, and how people will work through them. It may even be useful to draw a flowchart for your questions.

- Structure the survey into logical chunks, which can be organised on separate pages. This helps to group relevant questions together and makes the survey less daunting – one long page can be off-putting.
- Consider the most appropriate place to ask for personal information (for example, name, email and location).
- Use conditional logic - this is where respondents are guided to subsequent questions depending on their response. For example, if a respondent ticks 'No' to the question '*Do you cycle to work regularly?*' they can be routed past questions about what time of the day they go or what route they take.

Think about ways of encouraging your target group to respond. This will usually mean sending one or more reminders. For both online and paper-based questionnaires, consider using an incentive, such as a prize draw for vouchers or free training places. For further information on this, see [Section 5, *Getting a good response*](#).

Designing tests and forms

When designing tests or forms to help you monitor your outcomes, it is important to:

- keep them short and simple
- permit a record of who completed them and when
- make sure they really assess what you want them to
- bear in mind who will be completing them and under what conditions.

You may need forms for staff and volunteers to complete to record the progress they see users making – see an example on the next page.

Designing diaries

Diaries can be kept in different formats depending on the type of data you want to collect:

- paper-based
- web or computer-based
- audio
- video.

When deciding on a diary format, think about what will be most relevant both for the evaluation and for the participants. It is also important to consider how the format might affect the type of data collected and how you will analyse it.

Give clear and precise information to participants on the purpose of the diary and instructions on how to complete it. It might be useful to provide

an example of a completed entry in the diary or to give a checklist of things to record or think about – shown in the example at the bottom of this page.

Example of a staff outcomes monitoring form				
Name of young person:				
Date:				
Have you seen any changes in the following areas in this young person over the last six months?	Better	Same	Worse	Please describe what you have noticed:
Respect for other young people				
Respect for authority figures				
Avoiding conflict situations				

Example of a completed diary entry for a healthy living project					
	Monday	Tuesday	Wednesday	Thursday	Friday
Pieces of fruit eaten	1 apple and half a banana	None	Bunch of grapes	Ready made fruit salad from supermarket	1 banana and 2 apples
Amount of exercise taken	Walked into town from school (1 mile)			30 mins run	
What you ate for lunch	School dinners – pie and mash	Portion of chips and tuna sandwich	Pasta and salad	Baked potato and baked beans	Chicken sandwich

Once participants have started to fill in their diaries, you may want to check how they are getting on with them. Filling in a daily or weekly diary can seem an onerous task, particularly if people have other pressing issues in their lives, so it is helpful to keep them motivated.

Designing group activities

Any group activity will need careful planning and preparation. When designing a group activity, it is important to think about a number of points:

- **The focus of the activity.** Remember to focus the activity around the outcomes you want to monitor. Your outcome indicators will help you to design a topic guide for a focus group or the questions for a group in an interview. Limit the number of questions to allow for the group to discuss each one in their own time, and keep in reserve one or two additional questions or activities in case the session doesn't take as long as you anticipate.
- **How many people participate and who they are.** As a general rule, focus groups are usually limited to eight to twelve people. Focus groups work well when you have participants with similar characteristics, such as age, gender or social class, as this encourages a better communication flow. Group interviews are best carried out with a maximum of three to four people. Discussion groups can be larger. The size and composition of a group discussion can be more flexible especially if you are going to use interactive methods and break the group into smaller groups for certain activities.
- **The length of the session.** Group activities can be lively and dynamic, generating lots of discussion and ideas. Both the facilitator and the participants need to keep focused, so most group activities will last for a maximum of two hours, and often for less.
- **Recording the session.** Group interviews and focus groups can be recorded either by a note taker or with recording equipment as it will be almost impossible for the facilitator to take notes as well as manage the discussion. However, in group discussions you may be able to rely on participants recording some of the data by using interactive exercises or by eliciting responses that the facilitator can write up on a flipchart.
- **Taking account of participants' needs.** Choose your venue so that it is fully accessible to participants, provide refreshments where possible and consider other needs, such as childcare. Focus groups do not work well through an interpreter but a more flexible discussion group may suit mixed language groups where interpreting may be useful. If your group activities involve children or vulnerable adults, you should

be aware of specific issues around working with these groups. This is discussed further in [Section 5, *Taking account of users' needs*](#).

Example structure of a focus group topic guide

Welcome and context-setting

- Facilitators introduce themselves, the project and the purpose of the session.
- The group agrees ground rules, including confidentiality. Facilitators remind participants there are no right or wrong answers and that everyone will have a chance to speak and be heard.
- Facilitators explain how the information will be used.

Opening and introduction

Participants introduce themselves and their connection to the project or issue.

Transition question

A question is asked linking participants' experience to the key questions.

Key questions

Questions are introduced which cover all the key areas of the topic, including follow-up questions to extend the scope of the questions.

Ending

Facilitators reflect back or summarise main points raised by the group and call for final observations.

Communicate how findings will be taken forward.

Thank and close.

Designing observation tools

Outcomes evidence can be collected by recording change that has been seen, heard or experienced by an observer, either formally or informally. Whether the observation is explicit or not, it is important to provide a structure to the way in which data is recorded. This may be a simple pro forma outlining:

- background information, such as, name of observer, date and place
- details of the situation or person being observed

- prompts to enable the observer to look for specific outcomes information
- scales to record the frequency of things occurring or the extent to which changes happen. For example, a worker in a children’s centre may record her observation of how often a mother comforts her child when it cries against a scale of ‘every time / sometimes / occasionally / never’.

The observer may be an active participant in the activity or remain outside it, taking no part. It is considered good practice to let people know they are going to be watched and why, and to ask their permission.

You will need to provide clear guidance on carrying out the observation and give instructions on how to record it. This is particularly important to get consistency when there is more than one observer; in this case it can be helpful for them to do one or two initial observations jointly to make sure they have a consistent approach. There is more information on moderation in *Section 4, Training and supporting staff and volunteers*.

Example of an observation record sheet

Name_____ Name of observer_____

Date_____

Number of times child plays with others:

0 1-3 4-6 6+

Number of times child plays on their own:

0 1-3 4-6 6+

Type of toys child plays with:

Jigsaw Cuddly toy Scooter/bike Blocks Other

If you are repeating an observation exercise over time, you need to identify the unit of observation (the individuals, group or location) so that you can compare the two sets of data. Be aware that if people know they are being watched, this may affect how they behave, so take account of this when analysing and using observation evidence.

Designing ways to collect outcomes information visually

Your main consideration when using visual methods is whether they will provide good evidence, as well as involving people in the activity.

Using visual methods requires careful planning. You should think about the following:

- Which medium is most appropriate? Drawings, paintings and photographs can be powerful, but may not always convey outcomes clearly.
- Videos can provide a great sense of the person, event or place filmed, but have you got the resources to support this? Bear in mind that, as well as purchasing or renting equipment, there may be other costs, such as for training or editing.
- Who will take the images or make the recordings, and what support can you provide? Visual methods provide a great way of involving service users. However, you may need to provide guidance or support to people using equipment such as video cameras.
- How will you use the information produced? Check that your stakeholders will value it as good evidence.

It is helpful to develop specific guidance for people using visual methods to clarify exactly what information needs to be collected.

Examples of visual methods:

Graffiti wall – where people add comments or drawings to flipchart on a wall.

Body exercise – users draw an image of a body and add colour or words to convey how they are feeling about themselves.

Recordings – made by users using a camera or video camera to capture their thoughts or experiences.

Timelines or rivers – asking people to draw a line representing their time with the project and identifying significant changes along the way.

Using social media to collect outcomes information

When using social media to collect information think about the type of data that will help you evidence your outcomes. For example, you might want:

- quantitative data, such as how many times a blog post has been viewed or how many people have linked to a post
- qualitative data, such as how people have gained a better understanding of an issue or made changes in their own lives.

You may want to draw up a framework which will summarise your information sources and the information you will draw from them. For example:

Source	Indicator
Own website	Number of unique visitors per month Average time spent on site Average number of comments
Twitter	Number of current followers No. of predicted followers in 30 days
YouTube	Number of views Star ratings Comments
BlogPulse (a blog search engine)	BlogPulse Profile rank Citations Trend Search

You can then use this data to help you assess:

- to what extent your messages have reached people
- how much 'buzz' they have created
- whether people have become actively engaged in your issues.

Bear in mind that you will need time to set up a system to extract outcomes data and analyse this information.

Finding and using off-the-shelf tools

Using off-the-shelf tools to monitor your outcomes can save you time and effort. However, it is particularly important that you make sure that any tools you select:

- are relevant to the people you plan to use them with, for example, in language and tone
- are appropriate for your organisation and field of work
- fit closely with your outcomes indicators, enabling you to capture the precise information you need.

How to select an appropriate tool

Selecting an appropriate tool will involve answering a number of questions:

- **What do you want to assess?** Make sure there is a good fit between your outcome indicators and the tools you select, or you may find that participants are unable to respond, or you will get information that will

not evidence the outcomes of your work.

- **How was it developed?** It's useful to know how the tool was developed, whether users were consulted and how thoroughly it was tested. You might look for research that demonstrates the reliability of the data it produces.
- **How is it being used?** Some tools were originally designed as clinical tools for use in medical settings, so check how your tool will work for evaluation purposes or try and find an organisation that has used it to assess their outcomes.
- **Will it work with your users?** Think carefully how the tool would work with your specific user group. Tools need to be appropriate to your users in terms of language, format and length. If it's too long or complicated, this will put people off completing it. Tools also need to be sensitive to your outcomes. They need to pick up the important changes in the people or situations your work affects, no matter how small these changes may be.
- **How straightforward is it to use?** You may need people to be able to complete the tool without substantial introduction or support. Your pilot may test how straightforward the tool is for participants.
- **Is any support available?** Check whether the tool comes with additional resources, such as training courses, guides or IT systems.
- **How much does it cost?** Many tools are available for free whereas others may charge (either on a one-off basis or each time the tool is used) or require you to attend a training course.
- **Will it give you meaningful information?** Does it provide clear data that you can interpret? For example, will it show you recognisable patterns of difference across client groups?
- **Do you want something that has been validated?** Finally, you may want to consider whether any tools you plan to use have been previously validated in a clinical or academic context. They may have been independently tested and shown to measure what they claim to measure. Using validated tools is considered by some people to enable organisations to provide stronger evidence of their outcomes.

How to use an off-the-shelf tool

When considering using an off-the-shelf tool, consult with staff and users to ensure the tool will fit closely with your anticipated outcomes and

indicators. It should also fit well with the way you work and be appropriate to your users.

You may also need to adapt the tool to fit your work more closely. Some tools offer ways for you to do this, for example by providing blank pre-scored questions that you can fill in with your own outcome indicators. However, be aware that adapting a validated tool may undermine its validity and may cost extra.

Sources of off-the-shelf outcomes monitoring tools

Resource	Description	Web address
A handbook to data collection tools: companion to <i>A Guide to Measuring Advocacy and Policy</i>	Examples of practical tools and processes for collecting information from policy and advocacy work.	www.organizationalresearch.com/publications/a_handbook_of_data_collection_tools.pdf
A review of outcomes tools for the homelessness sector	This document provides detailed descriptions of 18 outcomes tools of relevance to supported housing and homelessness.	www.homelessoutcomes.org.uk/resources/1/PDFsguidetools/ReviewofOutcomesTools.pdf
Charities Evaluation Services Resource Guide	An online resource guide to over 100 online and published books, tools, discussion papers and factsheets on all aspects of evaluation.	www.ces-vol.org.uk/index.cfm?pg=315
Evaluation Instruments Bank	An online archive of freely available instruments for evaluating drug-related interventions.	http://eib.emcdda.europa.eu/html.cfm/index3060EN.html
Evaluation Support Scotland website	A web-based resource which signposts you to various tools.	www.evaluationsupportscotland.org.uk/resources1.asp?id=98
Fast Track measures	A set of tools for assessing child development and family relationships in relation to the prevention of antisocial behaviour.	www.fasttrackproject.org/allmeasures.htm

FRIENDS National Resource Center for Community-Based Child Abuse Prevention	A list of different tools and sample questions for the evaluation of work with families.	http://www.friendsnrc.org/evaluation-toolkit
Identifying Learning and Support Needs: a digest of assessment tools	A list of tools for identifying learning and support needs which includes some for assessing progress in these areas.	www.scotland.gov.uk/Resource/Doc/158343/0042889.pdf
Instrument Bank Directory	A web-based bank of tools used for HIV and behavioural research projects.	http://chipts.ucla.edu/assessment/ib_directory.asp
Measuring Impact Toolkit	A guide that includes examples of tools for collecting information.	http://www.kcfn.co.uk/assets/downloads/18/Kent_Measuring_Impact_Toolkit.pdf
Mental Health Improvement: Evidence and Practice. Guide 5 Selecting scales to assess mental wellbeing in adults	A guide which includes information on around 50 tools relating to mental wellbeing in adults. Links to the tools are not provided but some can be accessed via the Technical report mentioned in Appendix C	www.healthscotland.com/uploads/documents/5950-MentalHealth_%20Imp_%205_2676_12008.pdf
Toolkits: A Practical Guide to Monitoring, Evaluation and Impact Assessment for Development Work	Save the Children's guide to monitoring and evaluation which includes a range of practical tools that can be adapted to suit different circumstances and a chapter and tool on monitoring and evaluating advocacy work.	www.savethechildren.org.uk/en/54_2359.htm
Toynbee Hall's Collection of Outcome Measurement Tools	A spreadsheet listing different tools for outcome measurement, grouped for different user-groups.	www.toynbeehall.org.uk/core/core_picker/download.asp?id=2083&filetitle=Outcome+Measurement+Tools

nef's Tools for You	A free guide to over 20 different quality and social impact frameworks for third sector organisations.	http://www.neweconomics.org/publications/tools-you
Triangle Consulting's Outcomes Stars	A series of tools for monitoring outcomes with different user-groups.	www.triangleconsulting.co.uk/outcomes-tools-and-publication/

4 Preparing to collect information

Whether you are using off-the-shelf tools or ones you have designed yourself, there are a number of issues to think about before you start using them.

Making the process manageable

Using existing opportunities

It is important to identify the best opportunities for using the tools you have developed. The more you can fit your outcomes data collection in with your other work activities, the better. So think about ways to:

- collect baseline data when users first contact you (see *First considerations* in [Section 3](#))
- record outcomes data as you do your work.

You may find that you can adapt existing data collection processes. For example, if you are already getting feedback from users on how satisfied they are with your services, you may be able to ask them about the outcomes of your work with them at the same time.

Identifying new opportunities

If there are no opportunities to collect outcomes information through your existing data collection, you will need to identify new ones. In doing so, think about:

- who will be involved in collecting the outcomes data – both directly and indirectly
- what else is going on for your organisation that could affect your capacity to carry out this work
- when you will need the information.

Using samples and snapshots

By sampling, you can collect data on a smaller number of people, a smaller geographical area, or a smaller number of activities.

Samples

A sample group should be representative of the total 'population' of your user group, taking account of different demographic factors, such as race, gender, or age. If you have an imbalance in the sample, for example too many female participants or not enough people over the age of 65

compared to your actual user group, you might collect data that does not give you a true picture of your users' experiences.

When choosing a sample size, remember to allow for an estimated number of non-responses. If you want to carry out follow-up interviews with 30 people, you may have to draw from a sample of 50. However, bear in mind that a large user group does not necessarily mean having a large sample size for your interviews. Your decision will be guided by a number of factors, including the range of experience you are trying to cover, the type of data you are collecting and length of interview needed, and your own resources. If you want a statistically valid sample, there are various 'sample calculators' on the internet to guide you.

You can select samples in different ways:

- **Random samples.** With these you select randomly from a list of your whole user group so that every individual or organisation has an equal chance of being selected. For example, you decide on a start point and choose every 'nth' individual or organisation on the list. This allows you to make statistical generalisations about the wider population.
- **Stratified samples.** A simple random sample may miss out constituent groups, and therefore not be representative of a range of different experiences. You may decide, therefore to separate out groups within the main sample, for example by age, or if they have a particular experience, such as being visually impaired. You may also want to randomly select within the sub-groups of your user group (random stratified sampling).
- **Purposeful samples.** You may want to select who you collect information from depending on certain characteristics. For example, you may want to interview five people who have been able to access welfare benefits and five people who have not. This enables you to capture a wider range of views and experiences and will help you to make the most of the information you have collected from a smaller sample of people. However, you will not be able to use this data to make generalisations about your whole user group or to say that these are typical experiences.
- **Convenience samples.** You may simply want to survey people who are close at hand, such as passers by in a shopping precinct or park. This will not give you a representative sample but it may still be a useful way of assessing your outcomes.
- **Snowball samples.** You can use existing evaluation participants to recruit more people into the sample.

Snapshots

Carrying out a snapshot means collecting data within a specific time frame. For example, you may decide to gather data from every person that has called your helpline between 2.00pm and 5.00pm on a specific day, or over a week or a month.

If you decide to use a sample or snapshot method, you should put your findings in context by stating how you selected your sample and acknowledge that this may not be representative of the views and experiences of all your users.

Piloting and reviewing your tools

Before you start using your tools, remember to pilot and review them, as this will enable you to check whether they:

- are appropriate to the people who will complete them
- collect the information you need
- give you the data in a format that is accessible and not too complicated to analyse.

Pilot testing also ensures that the people involved know what their responsibilities are and are clear about how to carry them out.

Who to involve

The pilot stage is important. Give yourself plenty of time and try to carry out the test in normal conditions where possible, avoiding other events or priorities.

Ideally, you want to pilot your outcomes monitoring tools with a small group of people who are representative of your intended user group. Ask them to have a go at using the tools and then give you feedback on whether they found them clear, appropriate and easy to complete.

In some situations this could be difficult, so you might have to pilot your tools with your colleagues by asking them to fill in a survey or role play an interview. This can help you to identify whether the questions are clear and in the right order.

Reviewing your outcomes monitoring tools

At the end of the pilot:

- Collect feedback from those taking part about what they thought of the tools.
- Check that participants have understood your questions.
- Assess whether questionnaires and interviews were the right length and whether your questions have given you good data.

- Input and analyse the data to make sure that your IT systems are working well.

Piloting your tools may lead you to review the questions you ask or even to rethink the method you are using. Sometimes, it may help you to identify unexpected or negative outcomes that you need to explore further.

Training and supporting staff and volunteers

It is important to train and support the staff and volunteers using your outcomes monitoring tools. This will:

- help people understand why they are doing it
- enable people to follow correct procedures, for example, asking participants for consent or adhering to Data Protection regulations
- help people to gather data consistently
- improve the quality of the data collected
- help make sure data is recorded accurately and correctly.

If you are using more than one person to collect your outcomes data, particularly when using methods such as interviewing or observation, it is good practice to carry out a moderation exercise.

Moderation

Moderation helps you to standardise the way you carry out evaluation activities. It is important as it helps to reduce any bias in the way the data is collected. For example, if two different people are observing group sessions, it is useful to ask them to observe a couple of initial sessions together, so that they can discuss and agree how they are interpreting and recording what they are observing.

It is also helpful to think about other ways in which support or training for staff or volunteers might be provided. For example, you could:

- provide written guidance on using the tools
- make sure that any monitoring responsibilities are covered in staff or volunteer inductions
- identify someone that people can go to for support
- run periodic support sessions to discuss any difficulties.

Managing information

Consider how you will store and process the data that is collected.

Storing data appropriately

Data collected anonymously or confidentially should be treated accordingly. Data can be stored and processed anonymously by giving users an identifying code, rather than using their name and it should be stored securely with access restricted only to those who need to use it.

You may find it helpful to develop a policy which outlines who has access to information, why, and what they will be using the information for.

Data protection

If you are going to collect any personal information (such as names, addresses or dates of birth), make sure that your organisation or project is registered with the Data Protection Commissioner and complies with Data Protection regulations.

'The Guide to Data Protection' gives practical advice and looks at the principles of the Data Protection Act. It is available on the Information Commissioner's website:

www.ico.gov.uk/for_organisations/data_protection_guide.aspx

Using IT

Developing IT systems to support your outcomes monitoring tools can help you to:

- view and use your data in an accessible format
- cross-reference different pieces of information in order to understand patterns and report trends
- give different people access to relevant information
- analyse large amounts of data.

For some organisations, developing a system may be as basic as setting up a spreadsheet or a simple database to store and manage the information. Other organisations may need to develop a more powerful information system. For further information on the different options for developing an information system, see CES' guide: *Using ICT to improve your monitoring and evaluation*.

Summary

In setting up your outcomes monitoring, it is important to do the following:

- Think through how your tools will be used to make sure they are used appropriately.
- Test out your tools and get feedback from everyone involved.
- Review the quality of the data you have collected and the way the process is working before you finalise your tools.
- Train and support the staff and volunteers who will be using the tools.

5 Collecting your information

Once you have set up your monitoring tools and processes, think about how to get the best out of them. This involves:

- taking account of your users' needs
- making sure you get a good response
- reviewing the quality of your data
- reviewing your tools.

Taking account of users' needs

It is important to make sure that people can complete your outcomes monitoring tools easily and that you are sensitive to their needs and any good practice requirements when working with them.

Working with children and vulnerable adults

When carrying out evaluation activities that involve children or vulnerable adults, it is advisable to make sure that you don't work alone. You may also find the following tips useful:

- Think about how you can make the activity as engaging as possible for your participants, for example by using pictures or games.
- Use appropriate language and check that they understand you.
- Keep it as short as you can.
- Allow time for the child or vulnerable adult to familiarise themselves with anyone they don't already know.
- Explain that there are no right or wrong answers.

Be prepared to deal with sensitive information that could be disclosed – for example, you should provide guidance for your evaluators on the procedure to follow should a young person disclose information of abuse.

Some young people or vulnerable adults may need an advocate to support them during the evaluation activities. You will need to think about how this will affect the way in which you collect your outcomes information. It will be helpful to brief the advocate about the evaluation and their role. During the activity:

- Allow additional time so that the advocate can support the person during the process.
- Check with the participant how they would like to use the advocate and their preferred method of communication.
- Talk directly to the person you want to collect information from rather than to their advocate.

If you are planning to collect information from children and vulnerable adults, your data collectors may need CRB (Criminal Records Bureau) checks. To do this, your organisation needs to be registered with the CRB or you could find an umbrella body to run the checks for you.

Working with people whose first language is different from yours

If you are collecting outcomes information from people whose main language is different from yours, it is advisable to use professional interpreters or translators rather than family or community members.

When using an interpreter, it may be helpful to do the following:

- Brief them about their role. It's important that they understand the need to ask questions precisely and to translate word for word so that you can collect accurate data and prevent any bias.
- Make sure that the interpreter is suitable in terms of his or her profile – gender, age, dialect may all be important to the user. You may also need someone who has some knowledge or previous experience in your field of work.
- Ensure that the interpreter has all the information they require well in advance so that they can prepare for the interview.

If you need to translate your outcomes monitoring tools, it is important to do the following:

- Use someone who has a good enough grasp of both languages to make sure terms and subtleties are accurately conveyed.
- Provide the translator with some general information about your work so that they are clear about the context for the translation.
- Ask a suitable person to review the translated materials before you use them.

Adapting tools to meet specific needs

In some cases you may need to adapt your outcomes monitoring tool so that it is appropriate for a particular user group. For example, an organisation may want to record a questionnaire onto an audio cassette for people who are visually impaired, or use pictures or symbols instead of written questions for collecting data from children.

Getting a good response

Making good use of your outcomes monitoring tools also involves thinking about how to get a good response. There are two types of non-response:

- Non-participation in different types of monitoring and evaluation activity, such as surveys or focus groups

- Non-response to particular questions, for example, in a questionnaire.

To encourage a good level of participation, it will be helpful to let people know in advance when you will be contacting them. Also, provide clear information about what the evaluation is for and explain why their help is important. Wherever possible, offer to share the results with them. Participation and response rates can be considerably improved by personal reminders. For example, telephone your focus group participants the day before the event, and send reminders just before questionnaire deadlines.

Offering incentives

Offering incentives can be helpful in encouraging people to take part in interviews or group activities. They can also increase response rates to questionnaires or surveys. Monetary incentives are used by some organisations, often in the form of cash or vouchers or entry to a prize draw. Incentives can also include non-monetary items such as pens or key rings.

Bear in mind that you may not be able to maintain anonymity if you need participants' contact details in order to provide the incentive. However, do reassure people that their details will be used only for the exercise, their data will be confidential, and that they can opt out of the incentive.

Whether you use incentives or not, you may want to encourage people to participate in your evaluation by activities covering any reasonable expenses such as travel or childcare, and by offering refreshments.

Getting maximum response rate to questions

Questionnaire results are often marred by poor response rates to certain questions. Often people run out of steam before they reach the end. There are a number of factors that might be causing non-response:

- The questionnaire is too long overall.
- The questions are too complex or not understood.
- The questions do not feel relevant.
- The questions require too much research.
- Respondents have spent too much time completing 'free text'.

To try to minimise non-response, check out thoroughly how long the questionnaire will take to complete and think carefully about what is of most interest. Make sure that you do not ask for factual information which could be accessed elsewhere (for example from your database), and encourage qualitative information only where it will be most useful. This is where your pilot testing of the questionnaire is most important. Think carefully also about the positioning of different questions – don't leave the

most important to the end – and in an online questionnaire, decide which questions to make compulsory.

Getting a convincing response

If the numbers responding or participating are low, your evidence will be less convincing. You may therefore want to consider:

- encouraging more people to complete your outcomes monitoring tool, for example by offering an incentive or extending the deadline for completion
- contacting a wider group of people
- using a different method.

You should also try to get feedback from users with a range of experiences and backgrounds or your findings may be biased towards certain sub-groups. It may not be possible to change how many people, or which type of people, complete your monitoring tools. But it is important that you reflect any potential bias when you analyse and write up your findings.

Collecting useful evidence

Once you have started using your tools, it's a good idea to keep an eye on how well they are working.

Checking data quality

Find some time on a regular basis to check the amount and quality of the data that has been collected. For example, you can select a random sample of questionnaires and check that they are being filled in correctly. You may also want to listen in to some telephone interviews or sit in on an observation and check the notes taken.

You should also ask for regular feedback from the people using the outcomes monitoring tools as they will have first-hand experience of how the tools are working in different settings and with different individuals. This may highlight the need to provide more training and support for staff or review procedures that are not working.

For more information on data analysis, see the Urban Institute's guide, *Analyzing Outcome Information* www.urban.org/publications/310973.html

Review your tools

Finally, having set up your outcomes monitoring processes, it is important to look after them! Without ongoing care and attention, people tend to forget to use the tools or the tools themselves can become out-of-date.

It is therefore important to check periodically that the outcomes monitoring tools and processes you are using continue to be appropriate and effective. As your work develops, check that your monitoring remains relevant. As your monitoring develops, make sure you are not duplicating your data collection.

Review your tools on a regular basis, perhaps annually, to see if they need to be modified. Check whether:

- your desired outcomes have changed
- your monitoring timescale needs adapting, for example for longer-term follow up
- any tools need to be made more widely accessible, for example, translated into other languages or into easy read versions
- you need to collect data in a more interactive way.

You may need to make small changes, such as adding or deleting questions from a questionnaire or interview schedule, or you may need to revise your data collection more fundamentally.

Review also how well your data collection is supported within the organisation. Have new people received the training they need? Is there sufficient time allowed to do the work? Does your IT system properly meet your monitoring needs? Is there sufficient administrative support? Is the data being analysed and used?

Summary

The key points to remember when collecting outcomes information are:

- Make appropriate provision to meet the requirements of working with specific user groups, including children and vulnerable adults.
- Consider ways of increasing your response rate, including the use of incentives.
- Consider whether the response you get is large enough and reflects a broad spectrum of your users, and covers different experiences and perspectives.
- Acknowledge any potential bias when you write up your findings.
- Periodically review how well your data collection is working and make any necessary changes.

Final summary

This handbook has guided you through practical steps for identifying and developing ways to collect information about the outcomes of your work. The values and requirements of the voluntary sector, your available resources, the nature of your contact with users and the wider community will all shape the data you collect and how you collect it. However, the start point was being clear about your own information needs and those of your funders, users and other stakeholders. In a period of tight budgets and uncertainty, this publication will help you to develop efficient outcome monitoring systems and to more confidently demonstrate your value and the difference you make.

Appendix A – Top Tips

1. Be realistic about what you can do.
2. Involve relevant people in agreeing data collection methods and designing tools.
3. Agree methods and tools that best fit the information you need to collect and those you are collecting it from.
4. Make sure your methods are acceptable to your key stakeholders.
5. Base your tools on your outcome indicators.
6. Ask questions that will give you information on unexpected outcomes.
7. Keep your tools short, simple and clear.
8. Develop tools that complement and supplement each other.
9. Pilot test tools before using them.
10. Don't forget to collect baseline data as early as possible.
11. Make sure people collecting data are trained and supported.
12. Try to collect both quantitative and qualitative data.
13. Review your collection methods and tools periodically.

Appendix B – Further information and support

Guides to developing and using outcomes monitoring tools

The following guides contain information and guidance that is particularly relevant for people seeking to develop and use outcomes monitoring tools.

Guide	Description	Web address
A practical guide to outcomes tools	A guide written for managers of services working with homeless people to select appropriate outcomes tools.	www.homelessoutcomes.org.uk/resources/1/PDFsguidetotools/GuideToOutcomesTools.pdf
A practical guide to measuring soft outcomes and distance travelled	A guide to help projects and organisations to understand and implement systems for recording soft outcomes and distance travelled. It has been written primarily for organisations working in the context of employability.	www.esf.gov.uk/docs/distance1.pdf
Befriending and Mentoring Evaluation Resource Pack	A general guide to monitoring and evaluation which includes a detailed section on collecting information.	www.evaluationsupportscotland.org.uk/downloads/Evaluationresourcepack.pdf
Briefing Sheet: Examples of Effective Measuring Tools	Designed for practitioners working with families, parents and children. This briefing sheet accompanies <i>Knowing what you do works. Measuring your own effectiveness with families, parents and children: a short guide</i>	http://www.familyandparenting.org/Filestore/Documents/PW2009/measurement_tools_briefing.pdf
Constructing Rating Scales for Self-Rating and Observer Rating	Specific guidance on how to design scales to assess outcomes.	http://www.friendsnrc.org/joomdocs/construct_tools.pdf
Managing Outcomes – A	General guide about monitoring outcomes which	www.ces-vol.org.uk/index.cfm?f

Guide for Homelessness Organisations	includes information on using assessment tools.	ormat=22
Measuring Impact Toolkit	A guide that covers all aspects of getting to grips with measuring outcomes and impact. It is particularly relevant to organisations working with children and young people. It includes examples of tools for collecting information.	http://www.kcfn.co.uk/assets/downloads/18/Kent_Measuring_Impact_Toolkit.pdf
Measuring outcomes toolkit	A guide on monitoring and evaluation, targeted at small community and voluntary groups.	http://www.evaluationtrust.org/system/files/GCF+Measuring+Outcomes+Toolkit+%5B1%5D.doc
Mental Health Improvement: Evidence and Practice. Guide 5. Selecting scales to assess mental wellbeing in adults	This guide explores the selection and use of scales for assessing several elements of mental wellbeing. It includes a list of scales and an assessment of their appropriateness.	www.healthscotland.com/uploads/documents/5950-MentalHealth_%20Imp%20%205_2676_12008.pdf
NCVO – Measuring Impact: A review of resources	This guide aims to offer some direction to those with an interest in impact and its measurement.	www.ncvo-vol.org.uk/policy-research-analysis/research/measuring-impact
Using interviews and questionnaires to evaluate your project	Specific guidance on using questionnaires, interviews and group interviews.	www.evaluationsupportscotland.org.uk/downloads/SupportGuide2.2Interviews&QuestionnairesJul09.pdf
Using Qualitative Information for Evaluation	Specific guidance on collecting and using qualitative information.	www.evaluationsupportscotland.org.uk/downloads/SupportGuide3.4qualyinfoJul09.pdf

Using Technology to Evaluate your Work	Specific guidance on collecting information using technology, including: digital photographs, video, audio recording, mobile phones and the internet.	www.evaluationsupportscotland.org.uk/downloads/SupportGuide2.4technologyJul09.pdf
Visual Approaches	Specific guidance on collecting information using visual approaches: relationship maps, service use maps, lifelines, body maps and evaluation wheels.	www.evaluationsupportscotland.org.uk/downloads/SupportGuide2.3VisualapproachesJul09.pdf

Reports about the development and use of outcomes monitoring tools

The following reports describe some organisations' experiences of developing and using outcomes monitoring tools.

Report	Description	Web address
Family Action's Building Bridges Evaluation July 2007	An evaluation report containing a useful description of the process of using validated outcomes tools.	www.family-action.org.uk/uploads/documents/FA%20Building%20Bridges%20Evaluation.pdf
Feelings Count: Measuring children's subjective well-being for charities and funders	A report describing the process of developing a multi-dimensional questionnaire for charities to measure improvements in 11 to 16 year old children's subjective well-being.	www.philanthropycapital.org/publications/improving_the_sector/well-being/default.aspx
Outcome measurement in non-profit organisations: current practices and recommendations	This report describes the state of outcome measurement as implemented in a number of American non-profit organisations engaged in outcome measurement.	http://www.ppmrn.net/images/resources/Outcomes.pdf

The use of outcomes measurement systems within housing and homelessness organisations	This report explores the lessons learned by housing and homelessness organisations implementing an outcomes approach.	http://www.ces-vol.org.uk/downloads/u-seofoutcomesmeasurementsystemsinhoousinghomeless-332-340.pdf
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Sources of training

The following organisations provide training specifically related to monitoring outcomes.

Charities Evaluation Services: www.ces-vol.org.uk

Evaluation Support Scotland: www.evaluationsupportscotland.org.uk

National Centre for Social Research: www.natcen.ac.uk

Social Research Association: <http://www.the-sra.org.uk/training.htm>

The Social Media Academy: www.thesocialmediaacademy.co.uk

Appendix C – Glossary

Analysis	The process of questioning the information you have collected to find out what it reveals about progress towards your outcomes. Analysis can be done manually or electronically using software packages such as SPSS.
Baseline	A starting point for making comparisons. Baseline data are facts about the characteristics of a target group, population and its context, before the start of a project or programme.
Bias	A loss of balance and accuracy in your methods or findings which means that they will not be representative of your wider user group.
Data	Facts, statistics and other raw material gathered for a specific purpose. Data needs to be interpreted to give it meaning.
Evaluation	The process of using monitoring and other information to make judgements on how an organisation, project or programme is doing. Evaluation can be done externally or internally. (See also Self-evaluation, below.)
Impact	There are different interpretations of impact. It is often seen as the change, effect or benefit that results from the services or activities at a broader or higher level than an outcome. Others use it to mean the same as outcome.
Indicator	A sign or signal that can be assessed to determine whether a given thing has occurred or has been achieved (for example, an output or an outcome).
Moderation	A process of comparing judgements and scores (for example, in interviews or observations) in order to standardise and reduce bias in the way data is collected.
Monitoring	The routine, systematic gathering and recording of data. This may be done to check quality, change or progress.
Outcomes	The changes, benefits, learning or other effects that happen as a result of services and activities provided by an organisation or project.
Outputs	The activities, services and products provided by an organisation or project.

Pilot test	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 data	Data that is primarily descriptive, for example, of events, experiences or views.
Quantitative data	Data that is counted or expressed numerically.
Reliability	The extent to which the same result will be given each time the tool is used.
Response rate	The proportion of people asked to take part in evaluation activities who actually participate. Non-response is when individuals in a sample do not participate at all, or do not answer some questions.
Sampling	The process by which you reduce the total number of possible participants for an evaluation activity to a number which is practically feasible and theoretically acceptable (the sample).
Self-evaluation	When an organisation uses its internal expertise to carry out its own evaluation; evaluation is integrated into project management.
Soft and hard outcomes	Soft outcomes are typically defined as intangible, a matter of degree, and more difficult to assess. They are commonly used for changes in attitudes, self-perception or certain skills areas. These are often, but not always, intermediate outcomes. Hard outcomes are defined as quantitative and often more easily measurable.
Stakeholders	The people or groups who are affected by or who can affect the activities of an organisation. This can include staff, volunteers, users, customers, suppliers, trustees, funders, commissioners, donors, purchasers, investors, supporters and members.
Target group	The main group or groups you are working with and the people your organisation or project is aiming to benefit.
Triangulation	Looking for evidence from different sources in order to increase the reliability and validity of the findings.
User	A beneficiary of an organisation or project.

User involvement	Where users become active participants in the design and delivery of your activities.
User satisfaction	Involves finding out what users think of activities, products or services – for example, the location of an organisation or project, its opening hours or how helpful the workers are.
Validity	The extent to which a tool measures what it intends to measure and how well your findings reflect the reality.

Other publications from Charities Evaluation Services

Below is a list of publications from CES that you may find useful. All publications can be obtained from www.ces-vol.org.uk

Guide	Description
Discussion papers	CES' series of papers on evaluation covers seven important topics, including Outcomes monitoring and Assessing impact
First steps in monitoring and evaluation	A basic guide for organisations who are looking at monitoring and evaluation for the first time
Managing Outcomes	Practical guide to the effective use of outcome management within the homelessness field
Practical monitoring and evaluation	Comprehensive guide to monitoring and evaluation in the voluntary sector, now in its third edition
Using ICT to improve your monitoring and evaluation	This workbook covers the steps and issues you need to consider in developing appropriate computer systems that will help you monitor and evaluate your work
Your project and its outcomes	A booklet for trustees, staff and volunteers who are involved in planning, monitoring and evaluating their project. The aim of the booklet is to help you describe the outcomes you want your project to achieve



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