Measuring impact - Charity Finance Live Conference 2008

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Jean Ellis, Charities Evaluation Services

What do we mean by impact?

Within the third sector there is a degree of confusion in the use of the term 'impact':

- Impact is sometimes used to describe all the results achieved by an organisation, that is: its outputs (the products and services it delivers) and any of the changes or effects resulting from those outputs.
- For others 'impact' is used to refer to any changes or effects resulting from an organisation's activities, and 'outcomes' are seen as part of impact, or the terms may be used interchangeably.
- Others make a distinction between outcomes as the more direct benefits or effects of a project or organisation and impacts as the wider and often more long-term consequences for the social, economic and physical environment.

Are we talking the same language?

This different and slightly confusing use of the terminology is likely to continue. What is important is for organisations to agree internally and with funders/commissioners the level of change at which information is required and what information is feasible or useful for their organisations to collect. In CES' recent research on monitoring and evaluation in the third sector, most funders did in fact make a distinction between monitoring and assessing outcomes and impact. (See also Charities Evaluation Services (2005) *Discussion Paper 9: Assessing Impact*.)

I am going to address both outcomes and impact.

Being realistic

Only too often organisations suggest achievement at a level that is not realistic to assess. I evaluated an organisation that worked to improve security for international relief organisations and wanted to assess impact at the level of reduction in the number of kidnappings/hostage taking. These events were too infrequent and there were too many variables intervening to be able to make any causal links between the activities of the organisation and the level of kidnapping/hostage taking. What we had to do was to identify a realistic level of change that could be reasonably associated with the activities of the organisation, such as the development of effective security plans.

Another organisation trained fundraisers, and although the ultimate desired impact was increased funded income, this was long-term and again difficult to link reliably with the training. So instead outcomes were looked for in terms of improved fundraising plans and access to more diverse sources of funding.

The logic chain

Funding bodies may require information relating to government targets, such as entry into education, training or employment. It may be feasible to carry out follow-up studies to provide this information, but even when such studies are well-resourced, it is often difficult to get good longitudinal data.

It's important to be able to provide data, then, about the intermediate outcomes achieved, for example, in relation to improved skills and confidence and readiness for work.

It may be important to report against a national framework, such as the Every Child Matters framework, but you may have to accept that as an organisation you cannot report on reducing levels of childhood obesity, for example, but it will be important to show increased levels of exercise, or increased numbers of play spaces and to make the association between this and the area of desired impact.

Getting clarity

It is important then that organisations are clear about their specific aims and that outcomes are specified against each of these aims. Indicators then need to be carefully selected against each of these outcomes. Impact mapping, social accounting, the logical framework are all approaches or frameworks that have at their heart these relationships.

The CES planning triangle is a simple tool that organisations have found useful to get clarity about outcomes and outputs. Case examples and other resources showing how this tool can be used are available on the CES website www.ces-vol.org.uk

Measuring at the right level

CES often sees assessment being attempted at too high a level, for example, 'improved emotional well-being' or 'improved quality of life'. A measurement tool may be chosen which aggregates a number of different indicators against 'emotional well-being' for example, when the project can only realistically affect change in a small number of areas covered by the tool. The information provided then risks being misleading – even meaningless – as the organisation measures against indicators outside their remit to affect.

An evaluation framework

Often the starting point for organisations trying to measure outcomes and impact is a suggested method of data collection, such as a survey, and then people think about the questions to ask. This is the wrong way round. One of the most important steps is to establish an evaluation framework which sets out the identified indicators against the agreed outputs and outcomes. One of the benefits of this is that it allows you to focus on the indicators and identify data collection tools in relation to the various indicators that have been defined.

National level frameworks

Increasingly larger regional and national organisations are obtaining national level data by establishing organisational indicators around key themes or key identified aims. This level of monitoring needs to be broad enough to allow it to be used consistently across local organisations and projects and to allow for aggregation. At the same time at the local organisation or project level more specific information can be collected on local level outcomes relevant for local reporting needs and for internal learning and management.

Using more formal tools
Indicators provide the framework on which to hang data collection. One of the main reasons that organisations do not get good data is because questions asked in surveys are too vague and do not measure what they intend to measure. It is very helpful to test how reliable the indicators and the questions are by accessing some technical support and by testing the questions out.

Getting information on unexpected outcomes
While it is important to collect data against expected outcomes by clearly identifying indicators, in order to get information about unexpected outcomes, it is also important to introduce more open questions such as 'What other changes have there been?' 'What else have you achieved?' into formal data collection and allow for less structured feedback.

Using data collected less formally
Many organisations have great difficulty in collating, analysing and using the data they get from more informal methods, such as blogs, timelines, diaries. Yet using participatory methods does not mean that you have to abandon an indicator framework. Pre-identified indicators can act as prompts, or subject headings in more participatory methods.

Because the process is more open, other outcomes and indicators may emerge. These can then be incorporated into the more formal framework and used in more formal data collection processes as well.
These expanded indicators can then provide a framework which will allow some analysis of the data collected less formally.

The importance of preparation
One of the difficulties raised most often by organisations is the lack of a good response rate, particularly when data is being collected some time after the intervention. Making sure that those you are following up – whether they are users or partner agencies – know from the very start what you will be asking them and when (and involving them wherever possible), will help.

Only too often questionnaires or interview schedules are drawn up without the right amount of work being done in advance. It can be helpful to research other studies around your field of work and to carry out some exploratory interviews first as these will help to establish the important questions.

Getting a reliable response
There are a number of issues to consider in order to increase the reliability of outcome and impact data collected after the intervention. For example, if the stakeholder group are busy professionals or transient young people, it may be better to arrange interviews with them rather than to survey them. You then have

to decide if you are likely to access them on the phone or if it is necessary to do face-to-face interviews. If a survey is more likely to be completed by users with a certain type of profile, this will bias your response, and it may be better to have interviews with a smaller number, but a good cross-section of users.

Working together with consultants

Many organisations are successfully working together with consultants over a period of time to improve the quality of outcome and impact data, and this can be a relatively cost-effective way of improving data collection. Consultants can work with the organisation to establish a monitoring and evaluation framework and help to develop data collection tools. They can carry out interviews externally to supplement internal monitoring and help with data analysis.

Improving your analysis

If you are dealing with enough numbers, segment the data according to user profile, frequency/length of use of the service, access to other services/training and other important factors as this information may suggest significant differences. This is again a good reason to have some technical input into putting together a survey. This information may also throw light on any bias in the sample – older people, for example, may not have responded. This then needs to be made explicit.

This cross analysis may help you understand what some of the key factors are in achieving success. This will also be helped if you ask supplementary questions, for example:

- Which aspect of the service or intervention was most or least useful or important?
- What other factors were important in achieving change?
- What factors acted as a barrier to achieving change?

At the heart of this is recognising that it may not be possible to establish cause and effect, or to attribute the change entirely to your organisation. What you may be doing is establishing how you contribute to a web of interventions which together enable more long-term and sustainable change.