



Evaluation can help you to work out what difference you are making through your services or activities. The changes or differences you hope to make are your **outcomes** (for more on this, see **Evaluation Support Guide 1.1: Clarifying your Aims, Outcomes and Activities**).

**Evaluation Support Guides 2.1 to 2.4** help you to think through the information you collect to evidence your outcomes. This support guide focuses on where to store information so that it is 'at your fingertips'. It identifies a range of data storage solutions and their advantages and disadvantages. It explains some of the 'technical' ways of storing data – specifically databases and Excel spreadsheets. It identifies some key questions to help you to think through the best storage method for your information.

### Issues to think about

There are lots of different ways to collect information such as questionnaires, staff observations, informal feedback, statistics, records of attendance and activities. You will probably want a range of ways of to store these very different types of information.

Here are some questions to consider.

#### 1. Who is collecting the information and when?

Wherever possible information management should fit with the way you do your work. For this reason it is worth thinking about who collects the information and what is the best and easiest way to record it and store it.

However, this has to be balanced against the way that information will be used. Hence the second question:

#### 2. Who needs access to that information and for what reason?

Information is needed at all levels of the organisation, but the same information might be used differently for different purposes.

Not everything has to be analysed in great depth and reported back to funders. For example if you are evaluating a training course or event, do you need to record in great detail all the views about the lunch? In practice you act on that information and decide to keep or change the lunch providers.

This means that different storage solutions might be appropriate for different levels, as well as types of information.

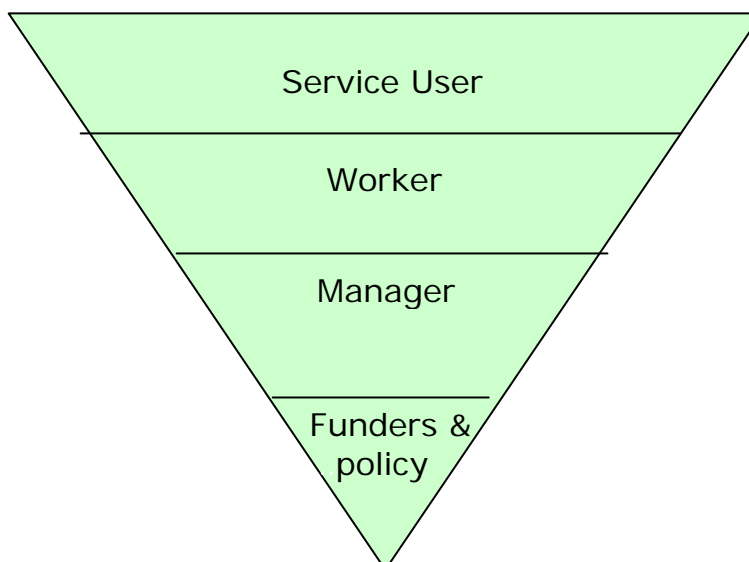
## Levels of information and how used

To reflect upon progress, plan next steps

To help individuals plan next steps, to assess progress across a group

To manage and plan work, to assess progress between services, to report on activities and outcomes to funders

To ensure money well spent, to help future decision-making



### 3. What resources do you have available: information and computer technology, staff and volunteer time?

To have an effective system you might have to commit more resources than you would like. But time spent setting up systems can save you time later, when you come to retrieve and analyse that information.

### 4. What's important now and in the future?

It might be possible to start small and build up your data storage systems. Even with technology, it's possible to start with a spreadsheet, and then export that information later on to a database. Databases can be built or adopted incrementally.

It's helpful to think through where you want to be long term, but with a practical eye to the priority now.

### Storage methods: getting the right mix

Method	Useful for	Issues to consider
'In your head'	Remembering individual stories and key events	Involves no extra work Prone to memory failure, Not easily accessed by other people
Paper Diary (staff or service user)	Noting dates, observations and basic facts such as numbers attending, places visited etc.	Easy to carry around and to note information as you go. Have to analyse manually. Harder to aggregate information across many individuals.
Outlook folders	Keeping emails with feedback and comments, requests etc.	Only for information sent or received through email. Have to analyse manually.
Case or 'group' files	Keeping information relating to one person or one group.	Easy to store large amounts of information. Easy to retrieve information re the individual or

		group. Heavy to carry around. Harder to aggregate information across a number of individuals or groups.
Files with the same type of forms or exercise sheets	To identify themes across groups and individuals.	Harder to link back to individual progress. Contexts may not be clear.
Comments file or book	For keeping feedback from third parties, clippings, notes about significant events	Easy way to store a broad range of information in one place Might have to dig further to understand the context of a particular comment or clipping
Excel sheets and database	See below	See below

## Focus on Spreadsheets

A **spreadsheet** is a computer application that simulates a paper worksheet. It is a bit like a table: with a grid of rows and columns, each cell containing either text or numbers. For numbers a spreadsheet cell may contain a formula that defines how the contents of that cell (or a combination of cells) should be calculated.

Here is an example of part of a spreadsheet of course participants:

Booking Form								
Course Date	Name	Job Title	Organisation	Special Requirements	Mailing	Confirmation Email	I know how to set outcomes indicators	Different methods and tools to collect info
		Development Manager					2	2
		Policy Officer					3	2

Spreadsheets, such as Microsoft Excel, are particularly good at calculating simple statistical information, such as:

- numbers undertaking specific courses
- number of organisations using our courses
- distance travelled (if you are using a scored questionnaire)

They can also be used to:

- do simple text analysis – using 'word search'
- count things that have been coded. (For example, progress against goals might be coded as fully met, partially met or not met).
- create graphs for reports

However, because they are two dimensional (rows and columns) they are not good at comparing data between tables or even between columns of information.

They are much easier to set up than databases, so for small or simpler projects (or reporting), they may be sufficient. However, for larger or more complex programmes, databases may be better.

## Focus on Databases

The most common type of database is 'relational'. This consists of a series of interlinked tables of information. Each table consists of records of information and each record is made up of a number of fields of information. For example:

	Fields			
Records	First Name	Second Name	Address	Post code
	Mary	King	30, Cambridge Gardens	EG1 0IS
	Ryan	Peters	7, Lastingdale	EG2 0AS

Databases are specifically set up to process data or answer questions. They can count and show relationships between different tables and different types of data. They are therefore more sophisticated than using a spreadsheet.

For example a training database might contain the following tables

- Participants
- Trainers
- Training sessions
- Venues
- Feedback

This database could draw information from several tables and easily answer questions such as:

- Which training sessions did we hold in this geographical area?
- Which trainers got the best feedback?
- Which types of participants had the best outcomes?

You can use databases for a variety of purposes, not just monitoring and evaluation. For example you can use them for financial, contact, case and workload management. When considering this level of financial and time investment, it is helpful to develop an overall ICT strategy and be clear where this fits with everything else you do.

It is easy to be seduced by technology – the key thing is that it does what you need it to do!

### **Case Study 1: M8: Mates for young people** (a small voluntary organisation)

**M8!** is an organisation that runs a range of services for young people aged 8 to 16 who have problems at home or at school. Their aim is to help them develop into confident and balanced adults.

#### **Storage strategy**

##### **Excel**

- Scale assessment: beginning/ quarterly reviews/ end
- Goals: what they are and extent to which achieved by young people
- Attendance
- What happens when young people leave

##### **Personal files**

- Personal development plans and review paperwork

##### **Session files**

- Notes of group sessions and observations
- Visual exercises
- Photographs

- **M8!** decided to put mostly numeric stuff on Excel, because the project manager needed to provide these figures to the funder.
- More detailed information was kept in personal files, so that the worker and the young person could access them for personal reflection on progress and planning.
- Session files were kept by workers running those sessions to reflect on at quarterly meetings. In turn staff used these to feed into the annual report and report to funders.
- Analysis of the Excel stats was used to identify the potential case studies (typical, most and least success). Then a more detailed retrieval from case files was undertaken to analyse which factors helped and hindered progress.

### **Case study 2: Glasburgh Health Project** (a medium sized voluntary organisation)

Glasburgh Health Project has been running for many years. It has a range of services and projects including, a crèche, groups (walking, school, mums, cooking for men) counselling and complementary therapies, information services and policy work. Each service had its own way of recording their work and the difference they make, led by the needs of their different funders.

The organisation wanted to start tracking individuals' use of services across the organisation and to assess the cumulative and overall impact of the organisation on individuals and the community.

They spent some months developing a monitoring and evaluation framework for the whole organisation. This identified overarching outcomes

and an understanding of how each service contributed to one or more of those outcomes. They agreed basic information that would be collected across the different teams.

They decided to develop the database used by the counselling and complementary therapies team to include sections for:

- Individual contact details
- Referral and other agencies
- Sections per service: to mark as a minimum, individual use of service and evidence of relevant overarching outcome for individual and/or group
- Contact with outside agencies: to mark reasons for contact, summary of meeting and outcome, linked to overarching outcome.

Each project, could decide if they wanted to develop their sections further. They could also restrict access to personal information to key staff and the overall manager. This ensured confidentiality, particularly for individuals receiving counselling.

The database cost £5,000, took one year to develop and involved lots of staff time.

Some projects continued to use other methods for recording and storing information in addition. For example:

- Group workers kept paper files for any visual evidence (group exercise sheets, photos of graffiti wall etc).
- Counsellors kept personal files with visual progress tools and any other information that the client and worker agreed would be helpful for their reflection.
- The walking group worker took an attendance book with her on the walks.
- The manager kept a 'hurrah book' and 'hurrah outlook file' to record any ad hoc feedback, newspaper clippings etc.

## What next?

Now you have all this information, you need to understand it, so that you can use it to evaluate your work. For more information see **Support Guide 3.1: *Analysing Information for Evaluation***.

If you need advice about evaluation, or would like a copy of this guide in large print, Braille or audio, please contact Evaluation Support Scotland on [info@evaluationsupportscotland.org.uk](mailto:info@evaluationsupportscotland.org.uk) or 0131 243 2770. For other Evaluation Support Guides please visit our website: [www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk)