INSPIRING IMPACT

A good practice case study report

What good impact measurement looks like

May 2013

Evaluation Support Scotland

Inspiring Impact

Inspiring Impact is a programme that aims to change the way the UK voluntary sector thinks about impact and make high quality impact measurement the norm for charities and social enterprises by 2022.

Over the next decade we will work towards five key objectives under five themes, answering the key questions for the sector:

- **What does good impact measurement look like?**
- How do we know what we need to measure?
- How do we measure it?
- How can we compare with and learn from others?
- What's the role for funders?

Find out more at www.inspiringimpact.org

Partners

Supporters

Contents

Introduction

This case study report is one of the outputs of the Inspiring Impact programme (find out more at www.inspiringimpact.org). The content of the report draws on formal research and face-to-face interviews with individuals from Scottish charities, who have responsibility for measuring the impact of their organisation's work.

The three charities featured in this report were chosen as case studies on the basis that they are inspiring examples of good impact practice, and also for their efforts in promoting the case for adopting an impact approach. The Health and Social Care Alliance, Includem and Youth-Link (Dundee) are champions for Inspiring Impact's *Case for an Impact Approach* and *Code of Good Impact Practice*.

A journey to greater impact

In November 2011 New Philanthropy Capital (NPC) published *A journey to greater impact*[1], drawing on six 'bright spots'—charities at the forefront of impact measurement in the UK—to show that impact measurement is both worthwhile and possible.

The report was written for people who:

- Are trying to make the case for measuring impact;
- Want to set up or improve a measurement system, and
- Want to help charities measure their impact well.

Rather than promoting ideal best practice as defined by academics or researchers, NPC promoted real good practice, looking at the experience of charities and funders, including small, front-line organisations. They showed that impact measurement really is accessible for most organisations, and that it can be done in a way that is proportionate to their size.

Inspiring Impact's *Case for an Impact Approach* and *Code of Good Impact Practice*

We recently published the *Case for an Impact Approach*, which aims to inspire non-profit organisations to take an 'impact approach'. By impact we mean the broad or longer-term effects of a project or organisation's work. This can include effects on people who are direct users of a project or organisation's work, effects on those who are not direct users, or effects on a wider field such as government policy.

By impact approach, we mean consciously focusing on your impact—thinking through what impact you want to have and how best to achieve it, assessing what impact you're having, communicating this information and learning from it.

However, wanting to measure impact is only the first step. In fact, many non-profit organisations understand the need for good impact practice and want to get better at it.

[1] New Philanthropy Capital (2011) *A Journey to greater impact*.

However, they can encounter different definitions, confusing explanations, multiple methods, and sometimes, contradictory advice.

The *Code of Good Impact Practice* provides broad, agreed guidelines for focusing on impact. It sets out a cycle of impact and a series of high-level principles to follow. Each principle includes a brief description of how impact practice would look if applying the principle, an explanation of why it is important and some ideas about how to implement it.

About this report

This case study report builds on *A journey to greater impact*, showcasing three additional 'bright spots' from Scotland. These case studies highlight some of the benefits of impact measurement identified in NPC's report.

The case studies not only champion the *Case for an Impact Approach*, but also illustrate how they apply in their day-to-day work the principles set out in the *Code of Good Impact Practice*.

Youth-Link (Dundee):

Getting started

Youth-Link is a small Scottish charity which provides help and support to vulnerable and disadvantaged children in the Dundee area. Through its One-to-One Befriending and Kids Unlimited projects, Youth-Link recruits and trains adult volunteers to befriend vulnerable young people. Self-evaluation has helped Youth-Link to build its capacity to monitor and evaluate its impact, improve reporting and strengthen its funding.

Context and drivers

Meeting funders' requirements to secure funding

Youth-Link embarked on the self-evaluation journey in 2007, when the charity received funding from Laidlaw Youth Trust (LYT) for the One-to-One Befriending service. Other funders including Dundee City Council Social Work and BBC Children in Need also came on board looking for evidence of the difference made.

Linda Smith, Youth-Link Manager (One-to-One Befriending), says, *"We knew we needed to evaluate because it was filtering across the voluntary sector. Even councils were looking for you to self-evaluate your project, whereas you would hire someone to do it in the past. Councils preferred self-evaluation because that was their own approach and it cut costs."*

She adds: "*The Laidlaw Trust was good at looking at how to strengthen an organisation's funding and we weren't very good at evaluation then. We did struggle with evaluation initially. We just didn't know where to start."*

Development of measurement

In 2007 LYT commissioned Evaluation Support Scotland (ESS) to support Youth Link to build its skills and systems to evidence what it was doing and the difference it was making with LYT funding. The charity received support to analyse the information it had collected and to develop ways to measure the 'distance travelled'. Linda says, *"The support that was given highlighted the need for us to review the methods and tools that we used for gathering information. We now feel that, on the whole, we collect effective monitoring and evaluation information."*

Measurement today

Being a small organisation and due to the nature of its interventions, self-evaluation is not easy for Youth-Link: *"Collecting information about why a young person has been referred, which is often up to our volunteers to find out, getting volunteers to gather information to report on outcomes, or even asking the right questions to get the right information."* Nevertheless, Youth-Link continues to work on improving their evaluation systems.

Benefits of measurement

Motivating and inspiring frontline staff and recruiting volunteers

"One of the real benefits for us was talking to others and getting ideas. When you are on your own you really don't know where to start. ESS gave us a starting point.", says Linda. Small organisations can struggle with keeping evaluation skills and knowledge in house as they are strongly dependent on funding. In the case of Youth-Link, Linda says, *"[Youth-Link] ensure that evaluation is built into training for new staff and volunteers."*

Funders have a supportive role to play in relation to self-evaluation. They can encourage and enable funded organisations to self-evaluate, supporting them to build capacity and develop effective systems to demonstrate the difference they make with their money. In relation to this Linda says, *"The words monitoring and evaluation used to fill us with dread as we were unsure what exactly we had to do. With the support of LYT … we are growing in confidence."* Youth-Link has also received support from BBC Children in Need.

Improving services for beneficiaries

"We now realise that evaluation is important in developing the service being offered.", says Linda. By gathering and analysing the right information Youth-Link has been able to improve its interventions to ensure it meets the needs of the vulnerable children it supports. *"Over the past few years we have identified areas where changes could be made or new measures introduced to improve the delivery, impact and outcomes of the services we provide. The implementation of these changes has made a significant improvement in our ability to compile, write and provide full and comprehensive reports."*

Maureen McGinn, who was at the receiving end of Youth-Link's reporting activities, says: *"I have used Youth-Link as a case study to illustrate how a small charity can dramatically improve its reporting of impact. The difference between the 2008 report's outcome evidence and that shown in the 2009 report is simply outstanding."*

Understanding what works and why, what doesn't and why not

"You need a baseline or understanding of why a person has been referred.", says Linda. *"Often the referrer doesn't know the young person and records their perception of the situation or need instead. As a result, we often need to speak to someone who knows the young person, for example a parent, and what change they are looking for."*

For Linda, *"Getting the right language for parents and carers is challenging, sometimes they won't understand what you are asking. Before, we had a partial picture from young people, parents and family, and volunteers. Now we have a fuller picture because we are asking different questions to these groups. Before, we asked* 'are you enjoying your befriending relationship?'*, whereas now we ask* 'have you seen a change?'.*"*

Looking forward

"Our Kids Unlimited programme has just got Big Lottery funding, so monitoring and evaluation will be important.", says Linda in 2012. *"We're going to look again at our evaluation for this programme and see if we can tweak it for the One-to-One Befriending programme."*

So, although the challenges and struggles continue, Youth-Link remains on the journey. Their motivation, as Linda says, is the *"Need to capture the huge achievements and progress made by some young people. Huge achievements for some of our young people include:* 'he came in the door and smiled' *or* 'he took his coat off'.*"*

Read more

To find out more about Youth-Link (Dundee) and the One-to-One Befriending and Kids Unlimited programmes, visit its website: **http://www.youthlinkdundee.org.uk**.

Includem: Focusing on purpose

Includem is a Scottish charity with 12 years of evidence-based experience and a track record of providing a powerful one-to-one relationship-based service to hundreds of young people, when they are most at risk. Evaluation has become an integral part of Includem's practice, ensuring that it is no longer an 'add-on'.

Context and drivers

Helping Includem to improve service quality

When it was founded in 2000, Includem commissioned the Centre for the Child and Society, at Glasgow University, to develop an evaluation framework to assess the progress and outcomes for young people served by Includem, and the contribution made by different elements of the service.

Pamela Barnes, Head of Research and Communications at Includem, says, *"Accountability might be a reason [to evaluate impact], but it's not the only reason. You need to convert managers and give them ownership, for example by having team managers facilitate impact measurement training for their teams. Another way of driving up the worth of evaluation and increasing ownership is to use the data internally to improve performance, not just externally."*

Development of measurement

Embedding impact Includem's culture

After six years of the Glasgow University evaluations, evaluation was brought in-house. *"This was a way of saving money and maximising Includem's learning from evaluation.",* explains Pamela. Includem gave their Research Manager at the time responsibility for integrating evaluation into practice, ensuring it was no longer an 'add-on'.

Helping Includem to support and measure change

In 2010, Includem started using 'Teen Star', which is one in a range of Outcomes Star tools developed by Triangle for supporting and measuring change when working with vulnerable people. Teen Star is underpinned by the assumption that positive growth is a possible and realistic goal for all young people. It supports and measures this growth by focussing on young people's potential rather than their problems.

Measurement today

Includem’s approach continues to be rooted in a commitment to evidence-based practice. The charity routinely monitors outcomes through external and internal research and evaluation, and publishes its findings in its activity and impact report.

Benefits of measurement

Clarifying purpose and goals

Evaluation has helped Includem keep a focus on its vision and principles. *“Good self-evaluation focuses everyone to be more aware of what the organisation does, and why. It also helps you become aware of what all your external stakeholders think of you and informs your practice.”,* says Pamela. *“But at the start it can seem like more effort than it’s worth. The benefits are cyclical rather than linear, because it has to integrate into service improvement.”*

Improving services for beneficiaries

Includem has a longstanding commitment to evaluating the outcomes of its work with young people. Its central client database and stakeholder surveys allow it to comprehensively record service user characteristics, service activity and outcomes, and then analyse that data to report on impact and feed into service improvements.

Monitoring and evaluating outcomes also constitutes an integral part of Includem’s Framework of Intervention, with outcomes evaluation, customer feedback and practice experience used to inform service improvements. *“[Includem’s use of] the Outcomes Star has led to better measurement of individuals’ progress and improved services to individuals.”,* says Pamela.

Raise organisation’s profile and secure funding and resources

Pamela says, *“[The Outcomes Star] has also helped Includem’s reputation because it allows us to aggregate our results and report to local authority funders against service objectives.”*

“You need to use language meaningful to stakeholders. Includem stopped using the term ‘evaluation’ and now uses ‘impact’ instead. Positive feedback on the annual Activity and Impact Report suggests impact is more meaningful to stakeholders.” This evidence-informed move enabled Includem to win a contract in Clackmannanshire because, as Pamela explains, *“We were able to relate to the funder’s outcome focus.”*

Looking forward

“It has been a real learning process and cultural shift to integrate Outcomes Star within our practitioner toolkit - A Better Life.”, says Pamela. *“The guidance for implementation provided by the Outcomes Star was invaluable, including resources for training staff. We've realised that implementation is not a one-off, and we have planned refresher training for all staff to*

maintain and improve the quality of data recorded. The guidance for implementation provided by the Outcomes Star was invaluable, including resources for training staff."

"One drawback of this tool," Pamela says, "is that it was developed in England based on Every Child Matters*, therefore it is not an exact fit with the Scottish Government's* Getting It Right for Every Child *wellbeing indicators.",* which Includem actively endorses.

Includem is piloting the Wellbeing Web tool developed by Angus Council instead of the Outcomes Star, which will provide outcomes information better suited to supporting the work of an individual plan and also to report on overall service outcomes. *"Its flexibility also means staff will be able to use this tool when undertaking work with families as well as young people."*

Read more

To read more about Includem's activity and impact report visit www.includem.org.

Health and Social Care Alliance Scotland:

Understanding what works

ALLIANCE
HEALTH AND SOCIAL CARE
ALLIANCE SCOTLAND
people at the centre

The ALLIANCE is a Scottish charity led by its members, most of which are voluntary groups that directly support or represent people living with long-term conditions to make their lives better. The ALLIANCE used self-evaluation, or in-house evaluation, to show the impact of its members' projects and of its support to them, only to realise that self-evaluation evidence has been key to influencing policy thinking.

Context and drivers

Helping the ALLIANCE to influence others

The ALLIANCE (previously known as Long Term Conditions Alliance Scotland, LTCAS) was formed in 2006 by third sector organisations who came together to strengthen their voice on issues of common concern. Since then they have kept long-term conditions high on the political and policy agenda.

It works closely with civil servants, politicians and others to drive policy on a range of issues. *"We expected evaluation would help us find ways to highlight the importance of softer outcomes to civil servants who can be fixed on harder outcomes.",* explains Kevin Geddes, Director of Development and Improvement at the ALLIANCE.

Using proportionate and appropriate methods and resources

The ALLIANCE has been managing the Self-Management Fund (SMF) for the Scottish Government since 2009. Looking back, Kevin says: *"It was a new fund and the first time such work had been delivered. It was exciting, but the Government was possibly considering the risk that it might not work and that the ALLIANCE might not be able to deliver."*

The SMF encourages good practice to be shared and innovative approaches to be developed, which is why the ALLIANCE, in partnership with Evaluation Support Scotland (ESS), provided evaluation workshops for the 81 projects to build their evaluation skills. This enabled the ALLIANCE to capture and share learning. *"Self-evaluation was a way of showing the impact of our members' projects and the ALLIANCE's support to the projects. It was a way of showing a range of changing civil servants the effectiveness of our tools and approaches."*, says Kevin. *"Taking a self-evaluation approach allowed and encouraged member organisations to find new tools that worked for them. The evaluation tools had to fit with our person-centred approach, as well as be something service users felt comfortable with rather than off-the-shelf tools imposed by the government."*

Measurement today

According to Kevin, the ALLIANCE uses evidence to influence policy *"By making sure members' projects are featured at conferences and events, and that projects get together to share learning and approaches. We ensure civil servants see evidence from the ALLIANCE,* *member organisations and third parties. It helps that we've funded 81 projects and that gives a good variety. We can group similar projects and encourage some of them to report on hard as well as soft outcomes.",* Kevin explains.

In October 2011 the ALLIANCE published *The IMPACT Evaluation Report*, which reviews the background and aims of the self-management fund. It outlines how money was allocated, challenges, achievements and learning, and includes case studies from funded projects. The report shows how a funder and funded projects can work together to share learning. It is creative and reflective, telling the story of how and what difference is made to people's lives.

Benefits of measurement

Understanding what works and why, what doesn't and why not

According to Kevin, *"Self-evaluation has helped us not only to secure funding but understand what works and know we are doing the right thing. We didn't expect that learning to be so strong among the members' projects. It has also helped us be confident to say when things didn't work and to use the learning from challenging situations. We have seen a big change in civil servants' and Ministers' thinking.",* says Kevin. *"They now regularly ask for and use our stories and case studies rather than looking for evidence of hard outcomes only. It's fantastic to see the journeys people have been on used in this way. Some civil servants are now saying the focus shouldn't be on those hard clinical outcomes they started with."*

"Policymakers still occasionally slip into 'evaluation isn't real evidence', particularly around self-evaluation.", admits Kevin. *"There's some scepticism it's not real evaluation if it's self-evaluation and person-centred. So the story or key message needs to reinforce the benefits and validity of this approach. For the ALLIANCE, self-evaluation and a person-centred approach are much richer because it's built in from the start of the project. Unlike external or independent evaluation, it can be flexible and agile and doesn't mean waiting until the project ends for an external evaluation."*

Securing funding and resources by sharing learning and improving reporting

"Internally, the biggest benefit has been sharing learning between the projects. Three years down the line, a lot of projects are naturally (readily) working together and seeing the benefit of sharing their learning and resources, and applying jointly for funding. The ALLIANCE has helped overcome their initial fear of sharing too much information because that might endanger their funding.", explains Kevin.

Looking forward

"We are hoping the next round of the SMF will have a stronger impact than the first round. We have slightly redesigned its outcomes, drawing on key themes of what worked well in the previous round, and also to fill gap.", says Kevin.

Thinking of the future, Kevin says, *"On evaluation, we're happy with the way it has gone and the results. We're keen to look at different and more effective ways members could measure their impact and how the ALLIANCE could measure the impact of the fund overall."*

Read more

To find out more about the Self-Management Fund or the work that the ALLIANCE carries out more widely, visit its website at www.alliance-scotland.org.uk.

Calls to action

Measuring impact is increasingly becoming the norm in the non-profit sector. Charities are keen to demonstrate the difference they make to their beneficiaries' lives. Funders, on the other hand, are keen to learn about what works and why so that they can continue to provide funding, or reallocate resources more effectively.

"These organisations are really good at measuring impact… I wouldn't know where to start." Sound familiar?

Impact measurement does not happen overnight. It's not an afterthought. Saying that, it's easier said than done when the non-for-profit sector is buried in endless monitoring and reporting activities, which can feel like a diversion from what matters to them the most: supporting beneficiaries to help them improve their lives.

It's easy to feel overwhelmed by the amount of tools, methods and guides that are available to measure impact, especially when time and resources are limited (or non-existing). Remember, however, that impact measurement does not have to happen all at once. What matters is to get started: don't think too much about it, just do it!

Do you want to influence others but don't know where to start?

Impact measurement has the potential to move charities and funders from working in silos to sharing learning, working to break barriers to impact measurement, approaching challenges and celebrating successes together. All you need is willingness, positive communication and a 'can do' attitude from everyone involved.

Charities should not fear approaching funders to adopt a shared approach to impact measurement or at least to learn from each other's methods and results. So why wait? It's time for funders and charities to walk the journey to greater impact together!

Inspiring Impact's resources can help you measure your impact

The Case for an Impact Approach and *The Code for Good Impact Practice* provide useful advice and agreed guidelines for focusing on impact. Furthermore, the Code provides a series of principles, each of which include a brief description of how your impact practice would look if you were applying the principle, an explanation of why it is important and some ideas about how to implement it.

Inspiring Impact's work streams such as shared measurement, data, tools and systems, and coordinating support produce a number of useful resources which may help you to get started or to continue to measure impact.

You don't know where to start? Why not start by checking these resources out at http://inspiringimpact.org/resources/.

Produced by **Evaluation Support Scotland** for Inspiring Impact

May 2013