

# Inspiring Impact Network event – Shelving it? June 2019

**Evaluation Support Guide 2.5**  
Storing Information for Evaluation

**es** Evaluation  
Support  
Scotland

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.

**INSPIRING  
IMPACT**

**Choosing a data management system for your organisation: Frontline perspective**

Tim Crabbe

October 2018



**CHOOSING AN ELECTRONIC CASE MANAGEMENT SYSTEM FOR YOUR ORGANISATION**

**NPC**

January 2018

James Noble

**Introduction**

This is a guide for charities and other social sector organisations that are looking to choose, design and implement an electronic case management system. We have been prompted to write this from three observations:

- **Case management systems are important.** We think that to be effective organisations need to monitor their activities through routine data collection and feedback and, this requires an effective system.
- **Choosing and implementing a case management system is a challenge.** As we discuss in this guide there are many issues and pitfalls involved and charities do not tend to have much experience.
- **There is not much guidance or support available.** Our guide responds to other articles that have been written, but generally this is something that charities are doing without much help.

We see this guide as NPC's first foray into this area and we aim to do more. We are particularly interested in your experiences so please get in touch to share your views.

**How we define an electronic case management system**

There's a lot of confusion about the word 'system' because people use it to mean different things. So, it is important for us to be clear that in this guide we are only talking about 'case management' or 'customer relationship management' (CRM) software systems, in which you store all the [data you need](http://www.thinknpc.org/2016/08/01/2016-08-01-These-are-the-most-important-features-of-systems-for-service-delivery-and-report-management/). These are the most important kinds of systems for service delivery and report management. Conversely, we are not discussing fundraising or donor management systems (although many of the systems listed below can do this too!).

**What are the stages of system growth?**

Ready? We think that organisations fall into three stages:

\* <http://www.thinknpc.org/2016/08/01/2016-08-01-These-are-the-most-important-features-of-systems-for-service-delivery-and-report-management/>  
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\* A useful list of these kinds of systems can be found here: <http://www.thinknpc.org/2016/08/01/2016-08-01-These-are-the-most-important-features-of-systems-for-service-delivery-and-report-management/>

## ESS Support Guide 2b Storing information

<http://www.evaluationsupportscotland.org.uk/resources/132/>

## ESS blog

### Installing a new database – ESS's experience

<http://www.evaluationsupportscotland.org.uk/news/2016/Oct/11/blog-installing-new-database-esss-experience/>

## Inspiring Impact resources

### Choosing a data management system for your organisation: A frontline perspective

<https://www.inspiringimpact.org/resource-library/choosing-a-data-management-system-for-your-organisation-a-frontline-perspective/>

## NPC

### Choosing an electronic case management system for your organisation January 2018

<https://www.thinknpc.org/resource-hub/choosing-an-electronic-case-management-system-for-your-organisation/>

For helpful tips about how to evaluate your work see the range of [ESS Evaluation Support Guides](#)

**These resources can be found on either Evaluation Support Scotland's website or Inspiring Impact website. See web addresses below** ↓

Evaluation Support Scotland Scottish Charity SC036529  
[www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk)

Inspiring Impact [www.inspiringimpact.org](http://www.inspiringimpact.org)

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### Information

#### Commissioner's Office:

#### [Guide to General Data Protection Regulation \(GDPR\)](#)

<http://www.evaluationsupportscotland.org.uk/resources/147/>

#### Online tools for storing data (a sample of)

#### [Impactasaurus](#)

<http://www.evaluationsupportscotland.org.uk/resources/472/>

#### [Apricot Case and Data Management Software for Charities](#)

<https://www.inspiringimpact.org/resource-library/apricot-case-and-data-management-software-for-charities/>

N.B. There is a cost for using

#### [Salesforce for non-profit organisations](#)

<https://www.salesforce.org/nonprofit/>

#### [Substance](#)

<http://www.substance.net/what-we-do/>

#### Matter of focus

#### [OutNav](#)

<https://www.matter-of-focus.com/outnav/>

#### [Outcome Star™](#)

<http://www.outcomesstar.org.uk/about-the-star/what-is-the-outcomes-star/>

#### Inspiring Impact

#### [Data diagnostic – data collection self-assessment](#)

### Webpages

#### NCVO Knowhow

#### [How to plan a good database](#)

<https://knowhow.ncvo.org.uk/how-to/planning-a-good-database>

#### [How to choose a database supplier](#)

<https://knowhow.ncvo.org.uk/how-to/choosing-a-database-supplier>

#### Wiki How to do anything

#### [How to make a database using MS Access](#)

<https://www.wikihow.com/Make-a-Database-Using-MS-Access>

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