Information collection methods
Choosing tools for assessing impact
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Section 1: Getting started

Introduction

This resource is intended to help organisations starting out with their own internal self-evaluation to think through how they will collect data that will help them evidence their impact. The guide focuses mostly on collecting primary data. Primary data is new data that is collected specifically for a particular study. Section 7 of the guide also considers secondary data, which is data that has already been collected by other people and for other purposes – government statistics, for example, or data found in research documents.

You are likely to collect both types of information. Indeed, it’s important to get information from a number of different sources. This will allow a variety of perspectives to emerge and will strengthen your findings.

The resource provides guidance on developing your own tools. It also provides links to further publication titles and web links to off-the-shelf tools that may be useful for your impact assessment as they stand, or which you might adapt to meet your specific needs. You may also wish to use a validated tool. 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. Very often, validated tools are used in an evaluation alongside other methods, such as case review and interviews.

The following CES publications provide further information on accessing tools and resources for impact assessment:


Planning information collection

Your impact assessment should be closely tied in with the planning stages of your project or service delivery. Ideally, this is when you should set out clearly your aims, objectives, outputs and outcomes. If your work is already underway, it will still be important to make these explicit. There are a number of planning tools that can help you to do this. CES’ website and publications will introduce you to:

• the CES Planning Triangle
• a theory of change.

These can help you establish a foundation for your monitoring and evaluation. Once you have identified outputs and outcomes, you will need to set indicators. These are the well-defined measurable information that will provide evidence about whether you are achieving your outputs and outcomes.

It is helpful to set out your outputs and outcomes, and their indicators, in a table format, or framework. You will then be in a good position to consider the best ways to collect your data. You will also need to consider other factors, such as the skills and resources you have available to put into your data collection, and what sort of data collection activity is appropriate and proportionate to the work that you are doing.
Selecting information collection methods

Asking yourself the following questions will help you decide what sort of evidence you need. Once you agree on this, you will be in a better position to choose the most appropriate data collection methods.

**Depth of information required.** How much information do you need? At what level of detail?

**Sensitivity and complexity of the issues.** Do you need information on sensitive or complex issues such as people’s life style choices or behaviours?

**Time and skills required.** How much time and skill are you and your staff able to allocate to designing and using tools? For example, focus groups need skilled facilitators.

**Ease of collection and analysis.** How many and what type of questions do you need to ask? How easy will this information be to collect and analyse? For example, open questions such as, ‘What did you learn during the workshop?’ are more time consuming to analyse than closed questions requiring a ‘Yes/No’ answer, such as ‘Did the workshop change your understanding?’ However, open questions may provide richer information than closed questions.

**Credibility.** Will the methods you hope to use be acceptable to your stakeholders – that is, the people to whom you will be reporting and those who need the data or will otherwise be the audience for your findings? If not, the information you collect may be questioned. Some tools are well respected (for example, interviews and questionnaires) but they are not always the most appropriate. If you decide to choose more innovative, visual or participatory tools, make sure that your evaluation users agree these ways of collecting information will provide sufficiently credible evidence.

**Appropriateness to the service and its values.** It’s important to consider which tools are most appropriate to your organisation and its values. In some situations, more informal methods or anecdotal data may be acceptable, and in others you may need to use methods that are tried and tested, such as a validated questionnaire recognised and used in a particular field, for example, mental health.

**User views and rights.** Before you collect information from people, you should make sure they know why you are doing it, and how you will use the information. Make sure that they feel comfortable about the way that you are collecting the information and that you will treat information confidentially. For example, it might be useful to tape the interview, but you must always check whether your interviewee is happy with this. Think about other needs that they might have, which could relate to their learning, sight or hearing abilities, cultural background or other circumstances.

**Reliability.** A reliable method is one that can be applied consistently each time you use it, in different situations and with different people. It is essential when you are comparing information over time or between different participants and/or within different situations. If the question you ask can be interpreted differently by different people, your data may not be reliable.

**Validity.** Are you measuring what you intend to measure? To what extent, for example, are you relying on selective perception, rather than cross-checking through a number of data collection methods? How far do the questions you ask through your data collection tools provide valid evidence?
Section 2: Interviews

What is an interview?
An interview is often regarded as ‘a conversation with a purpose’. The interviewer retains overall control, and usually gets responses to specific questions around a particular topic or range of topics, and a record is kept of responses.

You can hold interviews with an individual or with a group. Group interviews are usually held when you have limited resources or when an individual response is less important. Interviews can be done over the phone or face-to-face in a formal or less formal way.

Why use an interview?
Short, structured interviews are useful to get consistent data from a pre-determined sample. Longer, semi-structured interviews can provide detailed information around complex and sensitive issues that are being researched. Interviews are often used to gain a deeper understanding of information than may be gathered through other methods such as questionnaires. They may also be used to complement participatory tools – for example, to explore visual feedback, which may need further discussion and interpretation. (See Section 6).

There are different types of interview:

Structured interviews
In a structured interview, questions are asked in a set order and with exact wording. This type of interview can be used for surveys, and interviewers are given detailed instructions on how to ask the questions. Most often questions are closed, with respondents choosing answers from fixed responses, but some open-ended questions may be included.

Semi-structured interviews
A semi-structured interview follows a less rigid format, with open-ended questions designed to draw out more qualitative information. Questions do not have to follow a pre-determined sequence, and the interviewer can explore the answers in greater depth, to probe and follow up answers.

Unstructured interviews
These are sometimes called depth interviews. Unstructured interviews are flexible and can be tailored to the individual and lead to greater understanding of the respondent, with different areas of information potentially being covered in different interviews.

These different styles can be combined. You may have a small set of specific questions to ask everyone, and a number of topic areas which can be explored more flexibly.

Short, structured interviews may be completed in 10 to 15 minutes, while semi-structured or unstructured interviews could last between one and two hours.
Setting up an interview

Interviewers should be:

- skilled in interviewing and knowledgeable about the field and people they will be interviewing
- active listeners and note-takers
- prepared with a short list of key questions.

It may also be important to consider the credibility of the interviewer for the interviewee. There are advantages and disadvantages to using an interviewer who is familiar to the interviewee. Some researchers argue that people are more likely to communicate with their peers around sensitive topics; others suggest that interviewees may prefer an outsider.

Before the interview

- Contact the interviewee in advance to agree a mutually convenient date, time and venue (if face-to-face) for the interview.
- Send the interviewee a list of the small number of topics that will be covered during the interview.
- Explain the purpose of the interview and what will be done with the information received from them.

Structuring and conducting an interview

A suggested structure for an hour-long interview is given below, together with some good practice tips.

**Preliminaries – 10 minutes**

- Thank the interviewee for agreeing to be interviewed and for their time.
- Remind the interviewee about the purpose and length of the interview.
- Make clear who you are and your relationship to any relevant organisations.
- Ask permission to tape and/or take notes during the interview with assurance that the tape/notes will be destroyed once the information has been used. This formal request for permission is important to protect both you and the interviewee.
- Assure confidentiality.

**Conversation with the interviewee to gather information – 40 minutes**

- Listen actively to the interviewee.
- Focus on what the interviewee means throughout the interview rather than recording everything that is said and trying to interpret it later.
- Write down key points rather than verbatim transcripts which may not be helpful.
- Remain neutral, but show empathy and respect, building rapport. Try to break down the barriers between your role as interviewer and the interviewee.
- Make eye contact, allow yourself time to process responses and probe further where necessary.
• Seek clarification during the interview so that you can accurately record what is meant and reduce the possibility of misinterpretation by you later.

**Feedback and clarification – 10 minutes**

• Signal that the interview will be ending soon. This helps both you and the interviewee to wind down and allows the interviewee to add anything that may have been missed.
• Clarify key points with the interviewee to check you have correctly interpreted and accurately recorded what they said.
• Share findings. Let the interviewee know how and when you propose to share the findings of the interview.
• Take some responsibility for taking forward issues raised. Interviewees may feel exposed after the interview, having shared some painful or personal issues with you. Alternatively, they may have requested help on an issue. You may have at hand information about some avenues of assistance for them.
• Thank the interviewee for their time.

**Group interviews**

A group interview with stakeholders, for example with a staff team, may provide more and better information than could be obtained in a series of individual interviews. A disadvantage is that one or two individuals might dominate the group, and that group views tend towards agreement, rather than allowing different views. Focus groups, discussed in Section 3, are a type of group interview.
Section 3: Focus groups

What is a focus group?
A focus group is a facilitated discussion usually held with six to eight participants from similar backgrounds. The main emphasis of this method is to collect information which emerges from the interaction between the participants. The aim is for a deeper or broader analysis to emerge.

A facilitator is responsible for guiding the group through a discussion ‘focused’ on a limited number of questions based on a core topic and making sure that there is a full record of the discussion. Focus groups usually take place over one or two hours.

Why use a focus group?
Focus groups are a widely accepted method of qualitative research (they collect opinions, not statistics). The dynamics of the group is held to provide additional useful information. They can be used at any point in an evaluation, including at the end of a project or programme to reflect on the perceptions of outcomes and impact.

Setting up a focus group

Choosing participants
Number. Focus groups should be limited to between six and ten participants.

Type. Where possible, try to ensure the participants are as similar as possible in terms of age, gender and social class. Research has shown that where participants are very different, this can inhibit communication, or affect the quality of the information given.

Ready-made groups. Think about whether a cohesive group already exists. Some researchers argue that participants should ideally not have met before. However, practically it may be easier to interview a ready-made group, if one exists.

Incentives. Think about how you can make it easy for participants to participate. It may help to offer incentives like travel expenses, refreshments or payment.

Invitation. Write to the participants asking them to participate. Tell them about the broad topic area beforehand, but not the actual questions and give clear details about the date, time, venue and any incentives offered. (Some researchers argue that incentives should not be offered until the information collection has been done. However, practically this may not work).

Facilitator preparation
Number. It is best to run a group with two facilitators – one to run the session, one to make notes.

Skills. Whether the facilitators you choose are external consultants or members of staff, they need: skills in managing group dynamics; background knowledge on the topics being discussed; and awareness of the profile of the participants attending the group.
**Structure.** The facilitators prepare a structure for the discussion in advance – a list of questions or key topics. Depending on the depth of the questions, you may only need a few questions. Think in advance about ways in which you might re-phrase the questions in case they don’t work or participants don’t understand you.

**Briefing.** Allow 30 to 40 minutes either side of the focus group for the facilitators to agree on the process before the discussion starts and to de-brief and compare notes once participants have left.

**Venue.** Ensure you have a comfortable venue, with space, light and windows that open. Try to make sure it is wheelchair accessible.

**Note-taking or taping.** Focus groups are usually taped to allow you to capture all the points made and to get exact quotes. However, you may decide to take notes as well, and to write up the discussion from the notes with the tapes to refer to. This could save you time in lengthy transcription.

**Offering help.** Decide what to do if participants ask you for advice or information. Generally, it’s best to acknowledge what they have asked for and ask to speak to them about it after the group has ended. You may know where they might go for advice.

**Reporting results.** Decide in advance how participants will hear about the results of your work. Will you be able to afford to send them all copies of the report, or a summary sheet?

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**Running a focus group**

**At the beginning of the group**

- Explain why you are running the group and how they can help. Tell participants how they will find out the results of the work you are doing (and ask for their contact details to send them information, if appropriate).
- Explain to participants why you need to take notes and ask if they are happy about this. Ask for permission and assure them that the tape will be destroyed after the information has been taken from it.
- Assure participants that their names will not be used.
- Think about how you will put participants at ease.

**As the group goes on**

- Keep the topic focused and relevant to the participants.
- Let participants respond on their own terms, and define the issues that are important to them, but keep the group focused on the key topics.
- Give everyone the opportunity to comment – particularly those who may find it difficult to contribute.
- Respect participants’ right not to discuss sensitive topics but support them if they wish to do so.
- Deal with saboteurs (that is, participants who may try to take over the discussion or deliberately provoke others) politely. Their views are valid but ensure they don’t stop others participating.
• Ask for feedback periodically to summarise and clarify key points.
• Watch body language – if someone pulls a face, perhaps they disagree with the last point made. Ask them about it.

**Taking notes**
• Remember to record and use the whole discussion and not just the points that are agreed by the whole group.
• If you are not taping, if someone says something particularly interesting, try to write it down word for word so you can quote it later.
• Record non-verbal behaviour.

**Ending**
• As you come nearer to the end of the discussion, take some responsibility for taking participants out of focus group mode by letting them know the discussion is coming to a close.
• Draw the discussion to a close after a maximum of two hours. Remember, focus groups can be very hard work on everyone involved, particularly the facilitator. Don’t assume that participants have all the time in the world to give you.
• Summarise and clarify key points.
• Confirm how and in what form you will be communicating the findings of the focus group to the participants.
• Thank participants for their time and contributions.

**After the focus group**
• The facilitator and note-taker should spend some time reviewing the process and agreeing how to analyse and report on the information gathered.
• Type up the discussion notes as soon after the group as possible as this is when the memory of what was said and how, is most fresh.
• Remember to give feedback on the outcomes of the discussion to the participants, especially if you are planning to bring them back again for further focus groups.

**Online focus groups**
There is software available which will allow you to hold online discussions and focus groups. Although this software is used mainly for market research, it can be used for any kind of qualitative research. Participants are given a password and/or username to gain access to the moderator’s computer screen, and take part either by typing in or by phone.

**Advantages**
Without the need to travel, online focus groups can be convenient for participants – although you may need to over-recruit because of a potentially higher drop-out rate. Participants may also feel reassured by the anonymity of the discussion, and feel more able to share personal views and perceptions.
For the researcher, carrying out a focus group online can offer the advantage of greater reach geographically without incurring costs of travel and accommodation, potentially allowing more groups to be held, expanding the sample. Other advantages are that you can put specific questions and triggers on screen, as well as other media and documents for participants to view.

**Disadvantages**

There are some potential drawbacks to carrying out focus groups online. The computer technology itself may limit who accesses the discussion, or how they are able to participate, and this may bias your sample or your data. The researcher will also require specific skills to moderate the group and build an encouraging environment.

**Tips**

Make sure you send clear instructions well in advance, prepare well and contact participants by phone beforehand. This helps to build a rapport with them, to make sure they are confident about the procedure and to answer any questions they may have.

The following are example software suppliers:

- TheClickRoom by Dubit: [www.theclickroom.co.uk](http://www.theclickroom.co.uk)
- Liveminds: [www.liveminds.co.uk](http://www.liveminds.co.uk)
- Mindspace online: [www.onlinefocusgroups.co.uk](http://www.onlinefocusgroups.co.uk)
Section 4: Self-complete questionnaires

What are questionnaires?

Questionnaires are paper-based or electronic forms that have a series of simple or complex questions for individuals to complete on their own, or with some assistance if necessary or appropriate.

The questions asked may be ‘closed’ or ‘open’. Closed questions usually require a single answer (for example, yes, no, don’t know or a rating against a given scale). Open questions allow individuals to respond more freely.

Why use questionnaires?

Questionnaires are a relatively cheap and quick way to gather information from a large number of people on a limited number of topics. The same questions are asked to each individual, responses are summarised as statistics and can be easily compared. Online questionnaires provide statistical analysis for you.

Selecting respondents

You need to be clear about what you want to know, and why, and who will use the information before you decide who you want to complete your questionnaire.

Your respondents may come from:

- your target group – those who you would like to use your services
- your user group – those who actually use your services
- non-users – those in your target group who know about your services but choose not to use them
- potential users – those in your target group who do know about your services
- other stakeholders
- other professionals.

You may be able to reach all of a specific audience, for example, your service users, or other professionals you are in touch with. But if large numbers are involved, you may decide to select a sample. There are many ways to sample depending on:

- whether you are doing quantitative or qualitative research, or both
- what resources you have available
- what other methods of research you are using.

When you have decided who you want to reach with your questionnaire, it’s always helpful to pilot it first. If you analyse the responses, this will tell you if the questions are understood as intended and are giving you the information you need. The pilot test should also give you feedback on the content and design of your questionnaire, so time needs to be allowed for any redesign before sending it out.
Using questionnaires – task flowchart

1. Identify what you need to know: why; who for.

2. Identify who you need the information from.

3. Decide whether or not to post or otherwise distribute a questionnaire. Consider alternative means of information collection.

4. How large is the target group? Consider sampling (assume 15% to 40% response rate).

5. Consider whether the questionnaire will be online, hard copy, or both.

6. Decide how to collate and analyse the information: online survey analysis; spreadsheet; database?

7. Design the questionnaire carefully, consulting with others: short, clear and attractive; include instructions for return (including date and address).

8. Pilot the questionnaire, revise in the light of pilot if necessary, re-pilot if necessary. Analyse the results of the pilot.

9. Distribute the questionnaire through websites, email lists and networks. Use intermediaries where helpful to distribute hard copies to named respondents.

10. Distribute the questionnaire with carefully composed covering text explaining purpose and use, and clear deadline for response.

11. Regularly check responses against agreed satisfactory response rate.
Designing questionnaires

Confidentiality

Assure respondents that the information they give you will be kept confidential and that answers are collated and reported on anonymously.

In order to understand your responses better, it’s often important to gather some demographic information from your respondents. You may want to know who has filled in your questionnaire, and check if responses correspond to the profile of your user group, or the group you are targeting. Or you may wish to analyse the data by respondents’ age or other demographic, to see if there are any differences in the information provided. Very often you won’t need to identify who has responded, so you can reassure people that their responses will be anonymous.

However, you may want to follow up responses, for example by a short telephone interview. In this case, you will need to have names and contact details, but you should always give people the option not to provide this information. You may decide to code questionnaires with an identification number so that you are able to connect information to individuals if you need to. You may be able to connect answers to demographic or other information you already hold, for example, in a membership database or case records. So, don’t ask people to complete information that you are already able to access elsewhere.

Layout

- Keep the questionnaire as short as possible. For hard-copy feedback questionnaires, limit to one sheet of paper.
- Make the layout look as clear and attractive as possible.
- Use text size and colour in an online survey to enhance readability.
- Use page structures and question options so that it looks easy to complete.
- Use subheadings and clear explanation to guide people through the questionnaire.
- For all questions, give simple, exact instructions on how to answer (for example, tick the box; circle the number; add any comments in the space below).
- For online questionnaires, choose the question type carefully. For both online and hard copy questionnaires, make sure there is enough space for qualitative answers.
- Use filter questions (where respondents skip over questions that don’t apply) where appropriate, but double check that the filtering flows.

**Content and flow**

- Consider carrying out a small number of interviews to suggest the focus and important areas to cover.
- Only include questions you need. Make sure that you don’t already hold the data.
- Group questions together in a logical sequence. Questions should flow naturally, like a conversation.
- Start with questions that are general, easy to answer and not sensitive.
- Take particular care with sensitive or difficult questions, and put them towards the end.
- Ask for demographic information (for example, age, gender) right at the end.
- If you use a scale, define all the points on the scale (e.g., 1=excellent, 2=very good, etc).
- In most cases you will need an ‘I don’t know’ or other opt out option.

**Writing good questions**

- Keep questions short – a maximum of 20 words per question wherever possible.
- Relate questions to the present day or a specific, recent, short time period (for example, ‘Over the past week, how many times have you…?’).
- Use language that is clear, simple and accessible to the participants completing the questionnaire. Avoid jargon, slang, abbreviations or unfamiliar terms. If you have to use them, provide definitions or explanations.
- Ensure that all questions are relevant to the respondent and/or their organisation, and can be answered by them without significant time or effort.
- Questions should be clear, unambiguous and straightforward. For example, ‘Since you started with the project, how stressed are you feeling?’ (less stressed/about the same/more stressed) rather than ‘Have things improved for you?’
- Avoid double questions. For example, ‘Do you feel more confident and get out more?’ should be two separate questions.
- Make sure that questions are not open to different interpretations.
• Avoid questions requiring or suggesting a simple yes/no answer if you need more detailed information. For example, ‘Has the project helped you?’ could be replaced by: ‘How have you benefited from using our services?’ (Response options: No real benefit; get out of the house more; made new friends; learnt new skills; feel more confident)

• Be as exact as possible. Avoid words such as ‘often’, ‘typically’, ‘rarely’, which mean different things to different people.

• When constructing your questions, avoid making assumptions. Ask, ‘Did you gain new skills?’ (Yes/No) before asking, ‘Please list the skills you have gained;’ or have a ‘No new skills gained’ in the response options.

• Give participants the chance to say ‘I don’t know’.

• Make sure responses to most questions are quantifiable. For example, questions should have boxes to tick, or a choice of numbers on a scale; space for qualitative responses should add to quantifiable information on a given topic.

• Avoid making sensitive questions appear too intrusive. For example, for questions about debt, alcohol use, or other personal issues, ask for responses in broad categories.

• Use clear and logical response categories. Put the options in a logical sequence; use similar phrasing structure, and avoid mixing positive and negative statements.

• For simple yes/no facts use a list of boxes to tick, for example:

Are you currently:

☐ employed full time
☐ employed part time
☐ unemployed
☐ student/training
☐ retired

• Use scales for degrees of severity or frequency.

Example 1:
How often do you experience any of the following?

<table>
<thead>
<tr>
<th></th>
<th>Very often</th>
<th>Sometimes</th>
<th>Occasionally</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panic attacks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweats</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example 2:
How healthy do you consider yourself to be?

(1=very healthy; 5=very unhealthy) 1 2 3 4 5
### Factors affecting response rates to questionnaires

<table>
<thead>
<tr>
<th>Positive</th>
<th>Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>The questionnaire is sent direct to the person/department who will respond, with a clear explanation of its relevance.</td>
<td>The questionnaire is distributed with blanket coverage, with the hope that enough appropriate people will see it.</td>
</tr>
<tr>
<td>The questionnaire looks attractive and straightforward to complete.</td>
<td>The questionnaire looks messy, crowded and complicated to complete.</td>
</tr>
<tr>
<td>The questionnaire is short and to the point.</td>
<td>The questionnaire is lengthy and all-embracing.</td>
</tr>
<tr>
<td>All questions are relevant to the respondents and their organisation.</td>
<td>Many of the questions do not apply to the person/organisation responding.</td>
</tr>
<tr>
<td>Respondents can relate strongly to the topic or the concerned project/organisation.</td>
<td>Respondents don’t feel invested in the topic or project/organisation and are reluctant to respond.</td>
</tr>
<tr>
<td>The organisation/individual can see a benefit to them – perhaps in terms of service improvement or personally (like a prize draw).</td>
<td>The organisation/individual can see no benefit to them for responding and providing the information.</td>
</tr>
<tr>
<td>The questions are clear and unambiguous.</td>
<td>The questions are lengthy, complicated and ambiguous.</td>
</tr>
<tr>
<td>The information to complete the form is easily retrievable and accessible.</td>
<td>The information is not available without a great deal of time and effort spent on obtaining it.</td>
</tr>
<tr>
<td>The questions are received as neutral and objective.</td>
<td>The questions make assumptions, for example, about the organisation.</td>
</tr>
<tr>
<td>The questionnaire includes clear instructions for completion.</td>
<td>The questionnaire does not include clear instructions for completion.</td>
</tr>
<tr>
<td>The questionnaire includes the deadline for responses, and any return details.</td>
<td>The deadline for responses is not clear, and return details for hard copies are not easily located or available.</td>
</tr>
</tbody>
</table>
**Section 5: Comparing collection methods**

There are a range of issues to consider when choosing between different methods. This table compares three commonly used methods: face-to-face interviews, focus groups and self-complete questionnaires.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Interviews</th>
<th>Focus groups</th>
<th>Self-complete questionnaires</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of information</td>
<td>Rich as able to probe and ask further questions where information is complex.</td>
<td>A limited amount of sensitive information can be gathered.</td>
<td>Questionnaire format may restrict ability to get the information required.</td>
</tr>
<tr>
<td></td>
<td>A substantial amount of sensitive information can be gathered.</td>
<td>Can check that participants have understood questions asked.</td>
<td>Quality of information depends on quality of questionnaire design.</td>
</tr>
<tr>
<td></td>
<td>Can check that interviewee has understood questions asked.</td>
<td></td>
<td>Difficult where complex information is needed as cannot probe for meaningful answers.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Cannot control circumstances in which respondents complete the form. For example, someone else may affect their answers.</td>
</tr>
<tr>
<td>Financial cost</td>
<td>Relatively cheap, though consider extras: travel; childcare; room hire; refreshments and incentives.</td>
<td>Relatively cheap, though consider extras: travel; childcare; room hire; refreshments and incentives.</td>
<td>Online surveys provide a cheap way of reaching large numbers and provide a cheap option for quantitative data analysis.</td>
</tr>
<tr>
<td></td>
<td>Depends whether or not taping and therefore transcription costs.</td>
<td>Depends whether or not taping and therefore transcription costs.</td>
<td>Qualitative data analysis may involve additional costs.</td>
</tr>
<tr>
<td>Issue</td>
<td>Interviews</td>
<td>Focus groups</td>
<td>Self-complete questionnaires</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Time required</td>
<td>Time-consuming for the interviewer and those being interviewed.</td>
<td>Need to allocate enough time for planning and conducting the focus group as well as analysing and reporting the information collected.</td>
<td>Considerable time may be required for questionnaire design, including time to consult with stakeholders. Once designed, repeat questionnaires can be time efficient.</td>
</tr>
<tr>
<td></td>
<td>Can be built in as part of regular meetings which already take place.</td>
<td>If taping, needs time to transcribe.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Speed of the interview is usually determined by the interviewer.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If taping, needs time to transcribe.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skills required</td>
<td>Interviewer requires good communication skills and should be trained.</td>
<td>Good facilitation, moderation and analytical skills required. Facilitators should be trained.</td>
<td>Questions need to be well thought-through and designed. Expert advice may be useful.</td>
</tr>
<tr>
<td>Level of literacy required by</td>
<td>No literacy required.</td>
<td>No literacy required.</td>
<td>Literacy required – usually in English but not necessarily.</td>
</tr>
<tr>
<td>participants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Response rate</td>
<td>Usually high (may be lower for</td>
<td>High – instant response and</td>
<td>Response rate may be highly</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Some print and postage may be required if hard copies are necessary.
Information collection methods: Choosing tools for assessing impact

<table>
<thead>
<tr>
<th>Issue</th>
<th>Interviews</th>
<th>Focus groups</th>
<th>Self-complete questionnaires</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anonymity</td>
<td>None – although interviewee can give nicknames, false names or first name only.</td>
<td>None – although interviewee can give nicknames, false names or first name only.</td>
<td>Can be anonymous, although anonymity may be compromised with distribution to small numbers of known respondents.</td>
</tr>
<tr>
<td>Sample size</td>
<td>Can be controlled to match resources and requirements.</td>
<td>Small sample of individuals can be invited.</td>
<td>Large numbers of people can be contacted efficiently with a wide geographical spread, but little control over the sample of people who respond. Can target different groups or stratify sample to get responses illustrating different experiences.</td>
</tr>
<tr>
<td>Ease of collection and analysis</td>
<td>Interviews may not be consistent, particularly with</td>
<td>Complex to record and analyse as lots of qualitative data from</td>
<td>Questions are consistent, making analysis relatively easy.</td>
</tr>
<tr>
<td>Issue</td>
<td>Interviews</td>
<td>Focus groups</td>
<td>Self-complete questionnaires</td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Uses</td>
<td>May enable solutions to be identified.</td>
<td>Can lead to identifying solutions and group action.</td>
<td>Good for basic monitoring and getting user feedback on outputs and outcomes.</td>
</tr>
<tr>
<td></td>
<td>Good for exploring things of importance to the interviewee.</td>
<td>Good for exploring a new area.</td>
<td>Can summarise responses in numerical form.</td>
</tr>
<tr>
<td></td>
<td>Useful for getting depth on information on particular issues.</td>
<td>Helpful way of learning the language that participants use.</td>
<td>More limited use for generating ideas or for gathering information on complex issues.</td>
</tr>
<tr>
<td></td>
<td>Good for personal/sensitive/complex issues – can be discussed and explored one-to-one.</td>
<td>Creative – ideas developed within the group.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>The interviewer can:</em></td>
<td>Good for exploring different perspectives.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. be more confident that questions have been interpreted correctly and they are interpreting answers as intended</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User perspectives</td>
<td>Participants can feel safety in numbers.</td>
<td>The experience may also contribute to strengthening group</td>
<td>Respondents can answer questions in their own time and in any environment in which they feel comfortable.</td>
</tr>
<tr>
<td></td>
<td>Facilitators can see participants’ body language.</td>
<td></td>
<td>Respondents who prefer not to speak about their views can</td>
</tr>
<tr>
<td></td>
<td>The experience may also contribute to strengthening group</td>
<td></td>
<td></td>
</tr>
</tbody>
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Information collection methods: Choosing tools for assessing impact
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<tr>
<th>Information collection methods: Choosing tools for assessing impact</th>
</tr>
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</table>

- see the circumstances in which answers are given and how people feel about their answers
- take a more personal approach to sensitive issues. However, this may influence the answers.

The interviewee may:
- gain benefit from reporting their experience or views
- experience the interview as a useful part of their involvement with the project/service
- feel threatened due to lack of anonymity.

feeling and team spirit.

Group views tend towards the norm due to peer pressure, which can cause participants to artificially agree with others.

Group may be dominated by more articulate participants while some participants feel threatened and contribute less.

contribute in written format.

Questions may be misinterpreted or felt to be inappropriate and may not be answered.

May not feel comfortable with, or able to access an e-questionnaire.

Potential respondents may not feel sufficiently motivated to complete.
Section 6: Participatory methods

What are participatory methods?
We discuss these methods here in three categories:

- Visual methods, such as participants’ drawings, collages, photos and video footage.
- Interactive verbal feedback, such as participants’ diaries and story telling.
- Using diagrams and other creative tools.

Why use participatory methods?
Participatory methods can provide an important source of qualitative information that can often not be accessed by other means. This information can provide an effective complement to routinely collected quantitative information.

- Participatory methods offer a way of gathering data in a less time-consuming way than individual interviews or questionnaires. However, more importantly, they are seen as a way of passing some of the power in an evaluation to the participant; as a result the participant is more likely to feel engaged and own the results.
- Creative and participatory methods allow different views and perspectives to be captured in specific locations and at specific times.
- Different creative tools can be used for people who may not respond well to interview situations or to a questionnaire, or who may not have narrative skills. For children, particularly, creative methods may help them to recall events and feelings and talk about their behaviour.
- Visual methods can offer a valid method of self-report which is not reliant on words or numbers. They can also capture information which can be accessed later, for example digitally, without having to rely on memory.
- Participatory methods can be experienced as fun as compared with responding to a questionnaire or other more formal tools.
- Participants can be more independent and less restricted by criteria which have been set by the evaluator.
- With some methods, for example, visual methods, or storytelling, stakeholders can become partners in the evaluation process.

Visual methods
Visual methods can be used not just for observation, but as a form of self-report, providing a way of capturing events in a person’s life and as data illustrating change over time. Visual methods of capturing outcomes information can be used to draw out perspectives and feelings that may not have been articulated through words. As such, this method of data collection has gained increasing acceptance.

For example, Photo Diaries and Photovoice comprise:
- individual photographs taken by the participants
- discussions about the photographs.

It is important to discuss the photographs or artwork, framing discussion around themes or indicators, and allowing new themes to emerge.

When using photographs, you need to take into account confidentiality issues, and also seek consent by the individuals being photographed.

**Interactive verbal feedback**

Photographs and other visual methods can be used as a way of providing interactive feedback. There are verbal methods also that can provide interactive feedback. For example, participants can write on a 'graffiti wall' at events and workshops. They can keep a daily or weekly diary, or use social media.

You can get quantitative information in a number of ways in a workshop or other group situation. You can ask for a show of hands or hold a secret ballot. Or you could ask people to move around and group themselves to demonstrate agreement with certain categories.

You can collect information on the usefulness of your internet-based services by tracking the number of hits and visitors to your site and inviting users to email you with feedback. Hosting an interactive website can be a quick and relatively easy way to consult users, share information and get feedback.

**Story telling**

Participants can be asked to collect stories to demonstrate change. This has the particular strength that participants in the evaluation are directly involved in deciding the sorts of change to be recorded.

The most significant change (MSC) is a technique that is used mainly for monitoring and evaluating in an international development context. Once stories are collected, there is a selection of the most significant stories to demonstrate outcomes and impact. Stakeholders work as a group to discuss the value of the reported change. In a large programme, there may be several layers or levels at which these stories are shared and the most significant ones selected. The method can be expanded by further group work on the stories, to analyse how different stories overlap and the causal connections between different groups of stories.

Stories and case studies present specific cases, and if you are trying to come to any generalised findings, great care must be taken, analysing against a framework of criteria and indicators.

**Using mobile phones**

The use of mobile phones to collect outcomes data in real time (for example, behaviour change) is another approach currently used more in international development evaluation than in the UK voluntary sector. Data can be sent directly to a web-based Management Information System, with results updated as records are collected. For example, Magpi (developed by DataDyne, Inc, based in Kenya) is a mobile data collection software that has been used in 170 countries worldwide, largely for public health data collection.
Studies have been done about using mobile phones to collect data about young people’s use of drugs and alcohol, and their related behaviours, with participants answering questions about their daily activities, alcohol use, stressors and negative moods, and for collecting data on sexual activity in young people.

**Using the internet**

**Online polls**

Online polls are used to quickly assess people’s opinion on a specific subject. They feature one question only, and results (or at least the number of responses) are fed back to the website in real time.

Polls can be a useful way to gather data quickly and cheaply. However, they are sometimes considered to be an irritation by website users and, as those who respond are self-selecting, considerable sample bias is likely. Online polls can work well on news websites or on popular forums as long as the result of the poll matters to users and it fits well within the context of the website.

You can also set up a short online survey for your website users, for example to provide information on how they have used your publications and other resources. This could provide you with outcome information that might otherwise be unavailable. However, again, you will be unable to control who answers the survey. Some simple questions that help to identify the respondents’ profile will be useful.

**Discussion forums for data analysis**

Website discussion forums can be a great way for users to get information, share experiences and meet like-minded people. However, they can also be a fantastic source of data for evaluation purposes. As long as confidentiality is not breached (that is, the identity of the users is not revealed), discussion forum data can be mined for evidence of the difference a service has made or to identify areas of improvement. As users can stay anonymous, discussion on online forums is often more honest, revealing and detailed than data gathered by other means. The analysis of users’ discussions can also uncover unexpected outcomes and new areas of need.
Social media

You may be able to set up an online site where participants can share their diaries or their case stories to provide evidence of progress and change. Your project or programme participants may also provide feedback through blogs, podcasts and video storytelling, using social network sites, such as MySpace, Facebook, YouTube and Twitter. 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.

Using diagrams and other creative tools

Many of the ideas for participatory information collection are influenced by an evaluation approach called ‘Participatory Learning and Action’ (PLA). PLA emerged from various traditions including Participatory Rural Appraisal and participatory education approaches used mostly in the South (developing countries) as well as in urban areas in the North where it is known as Participatory Appraisal.

These tools include:

- Timelines – these can be used to show a participant’s journey over time, noting important changes.
- Daily activity charts – activities recorded can illustrate the extent to which an individual making progress against specific indicators.
- Ranking – this can be done by simply listing preferences in a priority order, by ‘pairwise ranking’, asking participants to choose between pairs of options, or by using a matrix, showing options on one axis and criteria on the other.
- Card sorting – project outcomes can be written on cards, and participants (individually or in groups) can be asked to sort the cards into piles to indicate their rating.
- Evaluation wheel – one option for this exercise is to divide a circle into segments, with each segment representing an outcome or outcome indicator. Participants can then tick the segment if they feel that this outcome has been achieved. It can also be used to show responses to activities or processes.
- Causal impact diagram – these diagrams show how different variables relate to each other, with links showing positive or negative relations between them. They can help to interpret what happened.
- Geographical mapping – geographical mapping is used particularly in international development evaluation to illustrate how land is used, and access to resources, such as water and irrigation. Repeated maps can show change over time.
- Social mapping – social maps can provide a visual and spatial illustration of social information, for example, on demographics, health, and infrastructure.
- Body mapping – you can use large sheets of paper and draw the outline of a person’s body. They are then asked to respond to questions, such as, ‘What are
you most worried about?’ ‘What are you most hopeful about?’ drawing and writing their answer on or around their body outline.

- Wellbeing mapping – different sorts of diagrams (for example, a triangle or star) can be used to map indicators of mental health, physical activity, social well-being and healthy eating.

**Other types of diagram**

**Flow diagrams, webs and networks** show interrelationships between different issues.

**Venn diagrams** are overlapping circles which show distinct and common features. They can be useful in analysing relationships between different stakeholders and institutions. Diagrams can be redrawn and compared over time to assess and analyse change.

**Road journeys** can be used to chart an individual or group’s journey and change over time.

**Matrices** show the relationship between two variables as a table with quantified values. For example, they can be used to show outcomes by gender or ethnic group or to tabulate material from other types of diagram.

**Wheels or pie charts** show the relative proportions of different elements of an item. They can show, for example, how people spend time during the day or week.

**Challenges of participatory methods**

There are a number of challenges to consider:

- For many participatory methods, there is an element of self-selection in who participates. This may bias the findings.
- Some participants may lack confidence in the method used, for example drawing, photography or story telling, and may as a result leave out details.
- A high level of skill may be needed to interpret diagrammatic or other visual representations, for example of well-being.
- Aggregating data from participatory methods can be difficult. Use of scoring systems may give a false illusion of objectivity.
- A judgement may have to be made about how representative the participants in a participatory activity were.
- Care needs to be taken when interpreting the data, as it may only represent a partial construct, and there may be a danger of over-emphasising data, analysing data out of context or distorting findings.

**Tips**

As with other information collection methods, time and care should be taken to make sure that you obtain valid and credible evidence.
• Spend time in advance to understand the context and to identify appropriate tools. Understand whether you need to make adaptations before you apply a tool.
• Accompany participatory tools with a semi-structured interview, observation, active listening, probing and note taking as appropriate. Record diagrams with digital photography.
• Seek out voices that are not being heard.
• Meet people when and where it suits them (not just you).
• Allow enough time for interaction.
• Record who attends and identify different stakeholder groups among participants.
• Prepare a list of key questions with which to interrogate the information collected.
• Have a continuous process of review in which you set aside time to make sense of collected information regularly rather than leaving it until all information has been collected.
Section 7: Using secondary data

What is secondary data?
Secondary data is information that already exists, collected by other people or organisations for a different purpose. It is usually readily available, although special permissions may sometimes be needed to access it.

It contrasts with data that you collect yourself through direct contact with respondents (for example through interviews or a survey). This data may be provided by previous evaluations of a project or programme, or a mid-term report, or it may be routine data collected by organisations. Secondary sources can provide both quantitative and qualitative data. Secondary data can be raw statistics or more unusually raw qualitative source data (such as interview transcripts). More usually it is data that is already contained in articles, publications, reports and other documents.

It will be helpful to consider how far the secondary data meets a number of key criteria:

- availability
- relevance
- appropriateness
- reliability
- replicability.

Why use secondary data?
One of the main reasons for collecting secondary data is to avoid duplicating work that has already been done. If you can use secondary data sources, you may be able to save both time and expense. There are other reasons for reviewing or collecting primary data:

- It will show the gaps in existing information and the quality of evidence already available.
- It can provide a context in which to place your analysis of the primary data that you are collecting.
- It can give you a greater understanding and insight into the problems, issues and practice related to the field in which you are evaluating.
- It can help to suggest evaluation questions.
- It can provide a basis for comparison for the data that you are collecting.

Using secondary sources

Using national statistics
You can freely access national and local statistics through government websites, such as www.statistics.gov.uk and www.neighbourhood.statistics.gov.uk. The Office for National Statistics (www.ons.gov.uk) is the largest independent source of national statistics.
There are also a number of sites where you can get more specific data on different topics, for example:

Domestic violence – www.womensaid.org.uk

Crime – www.crime-statistics.co.uk. You can also find data about reported incidents in a specific locality, for example, in www.police.uk

Data related to refugees and immigration – www.migrationobservatory.ox.ac.uk

**Literature review**

A literature review is a summary of relevant literature on a topic, or of research findings which relate to the project or programme being carried out. If you want to summarise all past evaluation findings in a particular field, your review may need to be highly structured or systematic. You might also contact similar programmes which have not yet published findings to learn about outcomes and best practice.

If you have the opportunity to work with other projects in the context of a larger programme, you may be able to review their data or evaluation findings.

**Using existing survey data**

If previous surveys have been carried out with your participant group, either for an earlier evaluation or for internal purposes, this may give you useful background or baseline information.

**Document review**

Many evaluations will include some element of a review of existing organisational documents, or client or other records, either print or electronic. You may wish to review formal reports, minutes of meetings, media reports, analysing them to extract themes related to the evaluation, to make a detailed analysis, or to extract specific content. If you are doing a structured quantitative or qualitative analysis, it will be important to document any criteria you use to rate and analyse material.

**Media analysis**

A media monitoring service can be used to cover content and editorial opinion. This is particularly useful to evaluate the effectiveness of campaigns through the dissemination of key messages in print, broadcast online and social media.

**Online desk research**

Online desk research allows you to monitor for take up of resources, use of new approaches and practice, or the dissemination of key messages. This can be done through targeted searches of specific sources or through keyword searches. This may take you into researching governmental, educational, and voluntary sector websites, publications, strategies and guidance.

**Challenges**

There are a number of challenges to consider when using secondary data:

**Quality and accuracy.** Your use of the data and its validity will be highly dependent on the quality of the secondary sources used.
Fit. There are a number of factors which may affect how appropriate the data is for your evaluation:

- Information may not quite fit the same frame or boundaries as your primary data collection; for example, the sampling may differ in important respects.
- Some issues, criteria or indicators may be addressed but not others.
- Concepts used may not be the same.
- Categories used may be different. Questions may be defined differently (for example, age or ethnicity under which data was collected may be different).
- Units of measurement may be different.

Gaps in data. Data may be available for some geographical areas and not others, or for certain time periods only.

Currency of data. The data may be outdated.

Tips

There are a number of checks that will help to make sure that your secondary data contributes to the collection of credible evidence.

- Check that you have access to all relevant and available data, such as organisational records, so that you are not presenting a partial view.
- Verify the dependability and reputation of the data source. Find out if their results are generally held to be valid.
- Ask what quantitative and qualitative methods were used to collect the data.
- Check the methods that were used to assure the quality of the data collection.
- For surveys, try to obtain access to the questionnaire itself. Find out the sample size and the sampling frame, and how representative the sample was. Check how the analysis was carried out. Check if the findings presented were consistent with the questions used.
Section 8: Final tips on collecting information

Ask why. For each piece of information you collect, ask yourself: Do we really need this information? Who is going to use this information and what for? Don’t be afraid to stop collecting information that you have no use for.

Avoid duplication. Check that you are not collecting the same piece of information more than once.

Choose the right time. Look for the most ‘natural’ place or time to collect the information you need. This will be as close as possible to the source of the information. For example, information on the number of people who attend a workshop would most naturally be collected during the workshop itself, not the next day based on the memory of the facilitator.

Explain why. Make sure everyone involved in the exercise understands why you are collecting the information and what it will be used for. If people understand why they are collecting information they are more likely to collect it properly.

Assure confidentiality and anonymity (where possible). Also, be clear on your data protection responsibilities when it comes to storing and using information written and otherwise. For example, profile information of your users should be kept separately (under lock and key) to their views on services so as to maintain confidentiality.

For advice on data protection call: Information Commissioner’s Advice Line: 01625 545745 (www.ico.org.uk)

Provide clear guidance. Make sure that everyone who is collecting information has been given clear and consistent guidelines on how to go about it. Provide guidance by writing down what forms are used, when and how they should be filled in, and what the information is used for. This will help to ensure that information does not get lost or forgotten.

Use the information. Rather than putting your information away so that it is never looked at again, give feedback on the results to the people who have been collecting the information and who have given you the information.

Get evidence from different sources. To increase the reliability and validity of the evidence you collect, triangulate your evidence. This means collecting information on the same topic from more than one source using more than one method.

Check quality and consistency. To make sure that all those involved in collecting information are asking questions in the same way, do a moderation exercise. For example, are you asking the same questions and recording responses in a similar way during interviews? Perhaps do a mock interview to check this out.

Integrate monitoring into your current work. If your monitoring and self-evaluation system is to be feasible in terms of time and cost, information collection will have to be integrated as much as possible into existing work. You will need to look at existing activities and, keeping in mind your other criteria, look for opportunities to build-in information collection.
Glossary

**Aims** describe the changes you plan to achieve in your user or target group.

**Evaluation** involves using monitoring and other information to make judgements on how your project is doing.

**Inputs** are the resources you put into an organisation to carry out an activity. Inputs may be human, material, financial or expressed as time.

**Impact** is the long-term change or effect as the result of your work and activities. The change relates to the achievement of your overall aim or purpose. It describes long-term, broad and sustained change, and may affect a wider population than your target group.

**Monitoring** is the routine, systematic collection of information for the purpose of checking your project’s progress against your project plans.

**Objectives** describe the planned areas of activities by which you are going to achieve your aims.

**Outcomes** are all the changes, benefits, learning or other effects that happen as a result of your activities. Outcomes can be end or intermediate (also called interim outcomes). Intermediate outcomes are steps along the way to end outcomes. They are often smaller changes that happen before the final, desired outcome can be reached.

**Outputs** are all the detailed activities, services and products you actually do or provide.

**Output indicators** are things you can use to assess whether you have delivered your outputs. This will demonstrate progress towards meeting your objectives.

**Outcome indicators** are things you can use to assess whether your expected outcomes have occurred. This will demonstrate progress towards meeting your aims.

**Soft and hard outcomes**: The term ‘soft outcomes’ is commonly used for changes in attitudes, self-perception or certain skill areas. These are often, but not always, intermediate outcomes. ‘Hard outcomes’ are often more easily assessed, such as getting a house.

**Targets** specify the quantity and quality of outputs and outcomes you hope to achieve.
Further information and reading

CES services
CES is committed to improving the effectiveness of the voluntary sector by developing its use of evaluation and quality systems. We provide a range of training courses, consultancy, support and publications. For more information, contact CES on: 020 7713 5722 or visit our website: www.ces-vol.org.uk

Other publications from Charities Evaluation Services
CES has produced a wide range of guides on monitoring and evaluation. Our publications list has full details. You might find the following particularly helpful.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
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<tbody>
<tr>
<td>The CES Resource Guide: Evaluating outcomes and impact (2013)</td>
<td>A guide to over 130 resources on monitoring and evaluating outcomes and impact, including approaches, methods and creative tools, sub-sector specific guidance, and links to useful websites containing further resources. Free to download at: <a href="http://www.ces-vol.org.uk/resourceguide">www.ces-vol.org.uk/resourceguide</a></td>
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<tr>
<td>First Steps in Monitoring and Evaluation (2002)</td>
<td>A basic guide for organisations who are looking at monitoring and evaluation for the first time. Free to download at: <a href="http://www.ces-vol.org.uk/firststepsme">www.ces-vol.org.uk/firststepsme</a></td>
</tr>
<tr>
<td>Practical Monitoring and Evaluation: A Guide for Voluntary Organisations, 3rd</td>
<td>Comprehensive guide to monitoring and evaluation in the voluntary sector, now in</td>
</tr>
<tr>
<td>Edition/Title</td>
<td>Description</td>
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<tr>
<td>Your Project and its Outcomes (2007)</td>
<td>A guide focusing on how to identify outcomes and their indicators and how to assess their achievement. It uses case examples throughout to demonstrate different stages of the process and different types of organisation. <a href="http://www.ces-vol.org.uk/freedownloads">www.ces-vol.org.uk/freedownloads</a></td>
</tr>
<tr>
<td>Using ICT to Improve Your Monitoring and Evaluation (2008)</td>
<td>This work book covers the steps and issues you need to consider in developing appropriate computer systems that will help you monitor and evaluate your work. <a href="http://www.ces-vol.org.uk/freedownloads">www.ces-vol.org.uk/freedownloads</a></td>
</tr>
<tr>
<td>Making Connections: Using a theory of change to develop planning and evaluation (2011)</td>
<td>This guide provides an introduction to the theory of change approach to planning, monitoring and evaluation, explaining why and how to use it. <a href="http://www.ces-vol.org.uk/freedownloads">www.ces-vol.org.uk/freedownloads</a></td>
</tr>
<tr>
<td>Discussion papers</td>
<td>CES’ series of papers on evaluation covers seven important topics, including outcomes monitoring and assessing impact. <a href="http://www.ces-vol.org.uk/publications">www.ces-vol.org.uk/publications</a></td>
</tr>
</tbody>
</table>

Other publications

**General texts on evaluation methodology**


O’Dwyer, LM and Bernauer, JA (2013) Quantitative Research for the Qualitative Researcher, SAGE.

Patton, MQ (2001) Qualitative Research and Evaluation Methods, Third edition, SAGE.


**Texts on specific methods**

*Interviews*
King, N and Horrocks, C (2010) Interviews in Qualitative Research, SAGE.

Focus groups


*Surveys and questionnaires*

Sue, VM and Ritter, LA (2007) Conducting Online Surveys, SAGE.

*Case study*

*Participatory approaches*

Chambers, R (2002) Participatory Workshops: A sourcebook of 21 sets of ideas and activities, Earthscan


You can find further information on participatory methods at The Institute of Development Studies (IDS) at the University of Sussex, which has over 4,000 publications in their ‘Participation Reading Room’ [www.ids.ac.uk/ids/particip](http://www.ids.ac.uk/ids/particip)
### Websites containing monitoring and evaluation resources

<table>
<thead>
<tr>
<th>Website</th>
<th>Website URL</th>
<th>Description</th>
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<tbody>
<tr>
<td>Charities Evaluation Services (CES)</td>
<td><a href="http://www.ces-vol.org.uk">www.ces-vol.org.uk</a></td>
<td>CES provides information, advice and training on quality and evaluation systems for the voluntary sector and community sector and its funders. The CES website contains a range of downloadable resources on monitoring and evaluation, including <em>The CES Resource Guide: Evaluating outcomes and impact</em>, which provides information on and links to over 150 resources.</td>
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<tr>
<td>Participatory Planning Monitoring and Evaluation (PPME) Resource Portal</td>
<td><a href="http://portals.wi.wur.nl/ppme/">http://portals.wi.wur.nl/ppme/</a></td>
<td>This website is developed by Wageningen UR Centre for Development Innovation. The portal aims at helping to build the capacity of individuals and organisations to effectively implement PPME systems. The website includes a section on tools and methods. It also provides a comprehensive list of tools used in monitoring and evaluation, including: focus groups, matrix analysis, questionnaires and surveys. There is a section on the use of video technology to conduct evaluations with links to sample past evaluations.</td>
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<tr>
<td>Community Evaluation Northern Ireland (CENI)</td>
<td><a href="http://www.ceni.org/">http://www.ceni.org/</a></td>
<td>This website contains a publications catalogue listing over 200 titles, including evaluation titles and contains links to other useful websites. It also has an FAQ section on monitoring and evaluation.</td>
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<tr>
<td>Evaluation Support Scotland (ESS)</td>
<td><a href="http://www.evaluationsupportscotland.org.uk/">http://www.evaluationsupportscotland.org.uk/</a></td>
<td>Evaluation Support Scotland provides specialist support across Scotland to voluntary organisations and their funders to help them to evaluate and learn.</td>
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<tr>
<td><strong>Information collection methods:</strong> Choosing tools for assessing impact</td>
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<td>The website contains downloadable support guides on various aspects of monitoring and evaluation, including:</td>
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<td>- Using interviews and questionnaires.</td>
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<td>- Using visual approaches to evaluate your project.</td>
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<td>- Using photographic technology to evaluate your project.</td>
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<td>- Using audio and communications technology to evaluate your project.</td>
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<th><strong>Homeless Outcomes</strong></th>
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<tr>
<td>This website, published by London Housing Foundation as part of its outcomes programme, has been developed to provide a one-stop resource for homelessness agencies who are interested in taking an outcomes approach to their work.</td>
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<tr>
<td>It includes materials to help agencies develop and deepen their understanding of the outcomes approach and includes the Outcomes Star, a tool for measuring the outcomes of work with homeless people.</td>
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<tr>
<th><strong>Inspiring Impact</strong></th>
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<td>Inspiring Impact is managed and delivered by eight third sector organisations. These include membership bodies to ensure it is owned by the sector, and impact measurement specialists to reflect best measurement practice.</td>
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<td>The Inspiring Impact has a number of resources designed to improve the measurement of impact by charities and social enterprises. These include a Code of Good Impact Practice and a diagnostic system, Measuring Up, to help organisations identify what they need to do to improve their impact measurement. This includes questions to help assess how well their current measurement practices suit their needs, what actions are needed to improve impact practice, and what particular approaches and tools may be useful.</td>
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<tr>
<td><strong>Outcomes Star</strong></td>
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| The Outcomes Star™ is a suite of tools for supporting and measuring change when working with people. There are 19 versions of the Outcomes Star adapted for different client groups and services, including older people, mental health, families and work. Versions of the Outcomes Star are available to download and view from the website.

The Star Online web application and implementation packages are also available. |

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<tr>
<th><strong>Monitoring and Evaluation News</strong></th>
<th><a href="http://mande.co.uk/">http://mande.co.uk/</a></th>
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<tbody>
<tr>
<td>This website is particularly relevant to international aid and development organisations. It provides a link to the Monitoring and Evaluation News mailing list, providing information on methods, tools and approaches. It also links to the Most Significant Change e-group and to other specialist monitoring and evaluation websites.</td>
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<tr>
<th><strong>Proving and improving</strong></th>
<th><a href="http://www.proveandimprove.org/">http://www.proveandimprove.org/</a></th>
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<tr>
<td>This quality and impact toolkit website for social enterprises provides personalised advice through the 'My Toolkit' section where organisations can get a diagnosis and suggestions of actions they can take straight away. The 'My impact map' helps you start measuring what matters. There are practical tools and guides to download and a 'tools chart' to help you compare approaches.</td>
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<p>| <strong>Resources for Methods in Evaluation and Social Research</strong> | This site links to online books, manuals and guides about evaluation and social research methods, such as surveys, observations and others. There are also links to sites about data quality, statistical analysis, and free statistical software, office suites, |</p>
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<tr>
<th><strong>United Kingdom Evaluation Society (UKES)</strong></th>
<th><a href="http://www.evaluation.org.uk/">http://www.evaluation.org.uk/</a></th>
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<td>The UKES exists to promote and improve the theory, practice, understanding and utilisation of evaluation and its contribution to public knowledge and to promote cross-sector and cross-disciplinary dialogue and debate.</td>
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<td>The website provides good practice guidelines for evaluators and has an online resource giving links to other useful publications or organisations working in the field of monitoring and evaluation.</td>
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<th><strong>The Urban Institute: Center on Nonprofits and Philanthropy</strong></th>
<th><a href="http://www.urban.org/center/cnp/">http://www.urban.org/center/cnp/</a></th>
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<tr>
<td>The Center on Nonprofits and Philanthropy, along with the Center for What Works, in the US, has developed a common outcomes framework to help standardise approaches to performance measurement in the non-profit sector. This framework provides outcomes and outcome indicators in 14 program areas.</td>
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<td>For each program, there is a sample mission statement, an outcome sequence chart, a table of candidate program-specific outcomes, and data collection strategies with suggested data sources for each outcome indicator.</td>
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<td>All the information is available to download.</td>
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