INSPIRING IMPACT

Putting 'The Code' into practice

Thoughts from the Code of Good Impact Practice Learning Forum

July 2014

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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 practice 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

Inspiring Impact Partners

Inspiring Impact Supporters

The Code of Good Impact Practice

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Foreword

We've always been passionate about impact in the voluntary sector. We are driven to improve people's lives in tangible ways and be able to demonstrate change. Right now, the ever dominant discourse of impact and outcomes in the sector is set in a tough political context; a context of spending cuts, financial crisis, value for money and changes in public services that requires everybody to think in new ways about how to get more for less.

This focus on how we can deliver more difference for our beneficiaries may be correct. But I urge us to be cautious of the drivers and where they might lead us. There's a danger that we are pulled into a 'business model' environment with the focus more on money and less on beneficiaries.

We understand this is our reality and we go into the discussion about impact and outcomes with a critical frame of mind. Our impact is the most important thing to us. It is crucial that we take ownership of what the sector should be doing with its impact; embrace it, define it and lead the way in championing research and evaluation as means for improving quality services.

The **Code of Good Impact Practice** asserts our intention to ensure we are planning, assessing and learning from our impact by applying principles fundamental to the voluntary sector. It can help us to keep our focus when conducting impact practice in our deliciously messy, complex, people-focused world. In the spirit of being honest and open (Principle 6) and actively sharing our methods and learning (Principle 8), the Code of Good Impact Practice Learning Forums were a place where we were proud of what we do around impact and brave enough to share it - warts and all.

Charlotte Weinberg
on behalf the Code of Good Impact Practice Learning Forum
Executive Director
Safe Ground

Background

In June 2013, at the end of its first year, Inspiring Impact launched The Code of Good Impact Practice (The Code). The Code sets out a cycle of impact practice and a series of high-level principles for organisations to apply in focusing on their impact.

In Year 2, the Inspiring Impact programme wanted to delve deeper into how organisations are bringing The Code to life in practical terms. To do this, NCVO ran a series of learning forums with organisations that are signed up to The Code and that have been, and still are, improving their impact practice.

Between January and June 2014 NCVO ran 4 forums with 11 practitioners who were leading impact practice in their organisations. You can meet them on the following page.

Through consultation with the participants, high level themes were identified for each of the forums:

1. Setting Direction – how impact practice links to organisational direction
2. Understanding & Communicating Impact – how we understand our impact and tell others about it
3. Underpinning Impact – the systems and processes that support our impact practice
4. Applying The Code – our learning from practice and the forums that we wish to share with others

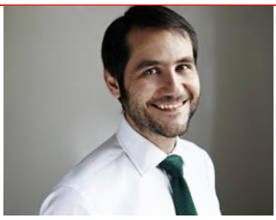
Against the backdrop of these themes, the forums consisted of full days of facilitated discussions, external input, and peer learning groups. The group shared their challenges in embedding impact practice and their ideas and experience around what has worked in their organisation.

This document is an attempt to pull together some of the rich learning that the forums produced and to apply it to The Code. It's our hope that in doing so it will help other organisations that are also looking to improve their impact practice to have a better idea of how they, too, can do so in line with The Code.

The content is organised under the 8 principles of the Code of Good Impact Practice. All of the practical examples come from members of the group.

The Code of Good Impact Practice Learning Forum

 Donna Buxton, Evaluation Lead, **British Heart Foundation**	Donna heads up Evaluation at British Heart Foundation and is responsible for the day to day management of a range of evaluations. Donna also sets the direction of evaluation practice and impact measurement, ensuring that findings from evaluations feed into BHF's overall strategy and particularly demonstrate the outcomes and impact of the charity's work.	buxtond@bhf.org.uk 020 7554 0389 British Heart Foundation [Over 3,000 Employees]
 Tamsin Shuker, Impact Manager, **Citizens Advice**	Tamsin leads on impact and evaluation for the Citizens Advice service. Her team is responsible for the evaluation of all strategic effectiveness projects, and also for evidencing and demonstrating the outcomes, impact and social value of Citizens Advice. Tamsin has led the services outcomes agenda for the last 8 years creating both shared measures and a suite of approaches that can be used by any of 350 local bureaux, all of which are independent charities.	Tamsin.Shuker@citizensadvice.org.uk 0300 023 1733 citizens advice bureau [Approx. 420 Employees at head office + Branches]
 Eleanor Harrison, Chief Executive, **GlobalGiving**	Eleanor Harrison is the Chief Executive of GlobalGiving UK, an digital charity that works with 427 grassroots partners in 89 countries worldwide, focusing on local solutions to global problems. GlobalGiving UK challenges traditional aid dynamics and offers access to funding, skilled volunteering and practical training for smaller organisations; helping them to achieve best possible impact on the ground.	eharrison@globalgiving.co.uk 0750 3971023 globalgiving.co.uk [7 Employees]

 Dimitrios Tourountsis, Head of Learning, **London Youth**	Dimitrios is helping London Youth to develop an evidence-informed practice and leverage knowledge. He works with policy-makers and practitioners to develop and support a vibrant evidence eco-system for the youth sector.	dtourountsis@londonyouth.org.uk 020 7549 2963 [Approx. 130 Employees]
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 Stephanie Stace, Senior Research & Evaluation Manager, **Samaritans**	As Senior Research and Evaluation Manager, Stephanie's role involves developing and commissioning new research and evaluation projects with external providers, and providing support to research students. She also provides support in integrating evaluation into our work from strategy to project level.	s.stace@samaritans.org [Approx. 100 Employees at head office + Branches]
 Helen Pearson, Co-director, **Soft Touch Arts**	Co-director of Soft Touch Arts, a charity based in and working in Leicester and Leicestershire that uses the arts to achieve positive change for disadvantaged young people. She is the organisation's lead on evaluation and impact measurement.	helen@soft-touch.org.uk 0116 270 2706 [Approx. 10 Employees]

 Alice Thornton, Policy & Research Manager **Student Hubs**	Alice Thornton, the Policy and Research Manager for Student Hubs, oversees the organisation's impact analysis, using research to contextualise data and also lead on policy initiatives.	alice.thornton@studenthubs.org 07570 970 270 [Approx. 30 Employees]
 Charlotte Weinberg, Executive Director **Safe Ground**	As Executive Director, Charlotte Weinberg is responsible for the strategic planning and development of programmes as well as designing frameworks for research and evaluation in order to highlight the organisation’s learning and development.	Charlotte.Weinberg@safeground.org.uk 0207 228 0866 [Approx. 10 Employees]

With thanks also to Sarah Handley from NDCS, Angela Schlenkhoff-Hus from CSV and Julie Lawes and Graham Sigley from Catch-Up for their contributions.

A message from the group:

“We’re people, like you, who are trying to drive a focus on impact in our organisations. We’ve created this document to share our challenges and the solutions that we’ve found through trial and error. This is in the hope that when you’re banging your head against the desk thinking ‘how do I do this?’ you can maybe get some ideas from how we’ve done it or at least know that you’re not on your own!

If you get really stuck then we’re happy for you to get in touch with us. We’ve included a bit of information about our role in the table above so that you can work out who might be the best fit.”

Principle 1. Take responsibility for impact and encourage others to do so too

We believe that all teams and roles in an organisation have responsibility for impact; it can’t be a specific function, for example like IT or a specific delivery project could be. However, leadership and support from a dedicated impact role or team can be very useful in helping staff to make impact a part of their roles.

If a focus on impact is not already embedded in the culture of an organisation then it can be hard to encourage everyone to take it on. The reality is that staff are often stretched and don’t feel they’ve time to do what they might perceive as an ‘extra’ thing. We’ve found that often impact practice is misunderstood and staff may find it threatening to their work; that people may find themselves or others questioning whether they’re ‘good’ at what they do. At the same time, some staff or volunteers often don’t feel accountable for the level of difference they’re making and are not always clear on how their work fits into the organisation’s overall impact.

This is a hard principle to apply as we’ve found it involves significant culture change in an organisation. But it’s worth it because it means that everyone is putting the difference made for their beneficiaries first. An organisation where everyone takes responsibility for impact can have a better shared focus on mission and more focussed decision-making. Services can be designed and delivered to create the most difference. It’s also really motivating for staff and beneficiaries to see what difference they can be and are making.

What we’ve found works:

We’ve found that making impact practice a part of your job descriptions can ensure staff know their responsibility for focusing on and demonstrating impact and are accountable for it. Including mention in staff objectives of the difference their work makes (e.g. change in skills or knowledge of beneficiaries), rather than just their expected delivery (e.g. number of training sessions) can also help to foster responsibility for actually creating impact through their work. The results can be evidenced through your general impact measurement or staff can provide examples of ways they feel their work has made a difference.

globalgiving.co.uk

At GlobalGiving UK all staff roles have a key responsibility towards monitoring and evaluation and it is explicitly stated in all new job descriptions. For new staff members this is also covered in our induction process and for existing staff members (and volunteers) we discuss our impact in monthly meetings. Key performance indicators and our annual strategic plans are developed and agreed by the whole team with an explicit focus on impact. There is both individual and collective responsibility for impact in GlobalGiving UK – and this shared responsibility, understanding and commitment to impact practice is integral to our success in making positive change happen.

With leadership from someone with a particular enthusiasm and allocated time for impact practice, setting an action plan for the organisation and allocating responsibility by department can be helpful for fostering ownership of impact planning, assessment and review.

ndcs
every deaf child

At the National Deaf Children's Society (NDCS) we created an 'evaluation plan' setting out our approach to impact practice and using the Measuring Up self-assessment tool to identify specific tasks around the plan, do, assess, review cycle. We then allocated responsibility for each task by group of 'senior management', 'all staff' or 'impact & evaluation lead'. This helped to ensure that everyone understood what we would do for our impact practice and their key role in it. Here's an example of how our template looked:

Area 1. Plan

	Action	**All Staff: action in 13/14**	**Impact & Evaluation Lead: action in 13/14**	**Senior Management action in 13/14**
1.1	We use local information to provide evidence of the need for our work			
1.2	We can describe who will benefit from our work			
1.3	We have a clear mission statement that sets out our overall purpose and values			

We've learnt that it's important to have senior buy-in to impact so that strategies are impact focused and to support culture change. But buy-in is also very important from those collecting information about impact in their day-to-day work with service users, be they from within the organisation or through an external partnership.

SAFE GROUND

At Safe Ground we have delivery teams of prison and education staff across 16 sites that are external to our organisation. We rely on them to collect information for us about the difference our programmes are making. We've invested a lot of time in explaining to them why the information is important to us and how important their role is in collecting it. We feel that this helps to raise expectations around data collection and return and foster responsibility. We've also spent time thinking internally about how we ramp up the quality assurance of this information in a way that shows how much we care about the quality of the data but isn't off putting or ungrateful about people's commitment.

To achieve internal buy-in, some of us have created internal communications materials to create understanding of the importance of focusing on impact for the staff. Others have run training sessions around impact or particular evidence gathering and analysis or gained support of individuals to help us to spread the word through the organisation.

British Heart Foundation

At British Heart Foundation, to support our evaluation activity, we have a number of 'evaluation champions'. We will be developing their role further to include the champions cultivating impact practice in tandem with their evaluative role.

Principle 2. Focus on purpose

It can be hard to focus on the bigger picture when day-to-day priorities overwhelm staff. People can have different opinions of what the purpose of their work is, the term can mean different things to different people (e.g. to senior management or funders) and the language can seem technical.

Although it can be really challenging to get people on the same page about purpose, it's crucial to build a common picture and language of why you exist. This can help staff and volunteers to gain clearer direction and helps ensure resources are allocated in the right way. This common picture and language can be useful too, when communicating outside of the organisation.

It also makes assessing your impact much easier. We believe that you should 'measure what you treasure'. By this we mean that you should focus on assessing the areas that you care most about as an organisation, that are best aligned with your purpose or that you have particular questions about, as opposed to measuring everything.

What we've found that works

If you start off by being clear on your purpose then everything, including resource allocation, can follow from that. Most of us have done this by developing an initial 'Theory of Change' which sets out the impact and outcomes we hope to create, in what order we anticipate them to happen and what key products and services we will deliver to create them. This scoping allows staff, volunteers and supporters to be clear on our purpose, engage in it and see how their activities fit.

SAFE GROUND

At Safe Ground we go through a particular process for our planning that ensures that it is led by purpose and involves all staff and trustees. Firstly, at our away day, we check on our purpose and agree all our desired outcomes (in a Theory of Change) and strategic aims for the year. We then create an operational plan, putting the aims on one side of a grid and the outcomes we want to achieve by the end of 12 months on the other. In the middle we map out how we are going to do it and in what timeframe. All staff are also involved in agreeing those steps for how to get there. This area has links into data collection and quality assurance that they are responsible for as well.

London youth

At London Youth we've invested time to ensure that all of our individual programmes have clear 'Theories of Change' and intervention models. This gives us clarity of focus on purpose from programme design to programme evaluation.

It’s crucial that any new staff or volunteers are brought up to speed on the work that has been done to set out the organisation’s purpose.

At Student Hubs every new staff member is inducted on the purpose of the charity in their very first week. We explain our theory of change, all of the systems for how we monitor our impact and a basic introduction to the principles of impact analysis. A key part of this training is the 'ham sandwich' rule - the example we always use to demonstrate what data is relevant to impact, and what isn't. Delegates to an event are often asked whether they liked the lunch provided - whether the ham sandwiches were to their liking - but this isn't the same as asking them whether the event had any impact on their thinking or behaviour. For us it is the latter which really matters, and so we always avoid asking 'ham sandwich' questions in evaluations of our impact.

Being clear on purpose extends to knowing why you’re collecting evidence about impact. Encouraging people to focus only on the information they need can end up saving a lot of time and resource.

At NDCS my colleague and I frequently question staff about why they are collecting x or y information and what they are going to do with the information. Very often, we recommend staff collect *less* data rather than more, as what they are collecting isn’t relevant to what they need to know, doesn’t link to the purpose or isn’t being used.

Maintaining a focus on purpose is facilitated by buy-in from the senior roles in the organisation. A post such as an impact manager can be useful to probe and ask the right questions. But other senior roles can ensure that the purpose is driving the strategic direction. Those with key responsibility for communications in an organisation are also vital for sharing the organisation’s purpose both internally and externally. We’ve found that time spent investing in relationships here is time well spent!

Principle 3. Involve others in your impact practice

It's easy to assume that others won't understand our impact, be engaged with it or consider it a priority for them.

It can also be hard to work out who to involve in our impact practice and at what point. There are always challenges in collaboration, such as time involved to manage partnerships, clarity on roles and even a fear of giving away information that is precious or sensitive to the organisation.

But we don't believe we can succeed in isolation. Involving other people in our impact practice gives us better, more sustainable plans and results and ensures common understanding of information.

What we've found works:

Working with funders and partners upfront to define impact collaboratively is great for planning strong, clear, impact that all parties are bought in to.

SAFE GROUND

At Safe Ground we have a grant from NOMs for our prison work, for which we worked closely with them to agree the planned impact. They had some expectations of desired outcomes and we shared our expected best outcomes. We had conversations to re-negotiate areas that we felt were unrealistic and we also added in some extra changes that we felt we could bring. We built a joint picture of 'the point of it' that included joint outcomes and work to suit us both.

We feel it helped that we started the conversation with them even before we put the bid in, along the lines of 'this is what we're thinking, what do you think?' This is the way we work with most of our funders now. If you're really clear about the changes you want to create and how, then you can have an intelligent and analytical conversation around it. We've never had a funder say 'we will never fund you again and we want our money back' because of it!

Involving beneficiaries and volunteers in defining the difference you want to make and then collecting information has been a good way for us to draw on their different perspectives.

At London Youth we hold workshops to define the impact and outcomes we want to create. These are revisited every year by groups of practitioners, managers, young people, volunteers and other stakeholders. Beneficiaries and staff are then involved in collecting information to help us assess whether we're achieving the agreed outcomes. We are also actively contributing to our sector's 'evidence ecosystem' – the evidence that other organisations working with the same beneficiary group are creating and using.

We've found real benefits in sharing and developing impact practice with other organisations working in the same field or area. For some of us it has led to shared planning, measurement approaches and learning about what works.

At Student Hubs we think it is really important to put our impact in context. Without an understanding of other similar interventions, it is very difficult to say whether the outcomes we achieve are impressive or less good than other organisations'. As a result, we co-founded a network of youth social action charities like ourselves, called Generation Change, and together we are working towards developing a shared measurement approach to our impact analysis. This will allow us to demonstrate how, collectively, we impact young people as a sector and to learn from each other's interventions to improve our own. It also means that we have a strong network of impact analysts and evaluators from similar organisations, whose expertise we can draw on for advice and inspiration.

You'll need diplomatic skills to bring people together and involve them in your impact practice. We've also found it helpful to have access to networks of practitioners. An external view can give a new perspective or provide an independent voice. Sometimes we've used external facilitators to run sessions to gather input from stakeholders.

Principle 4. Apply proportionate and appropriate methods and resources

Once we've spent time convincing someone of the importance of impact practice, it seems a shame to then reign in their enthusiasm. But, if not done in a proportionate and appropriate way, impact practice can be very resource intensive, particularly the assessment and analysis. That's not to say that we don't expect to invest significant resource and effort into impact practice, but done in the right way it needn't be overwhelming.

Often it's tricky to secure the resources to cover the impact practice we want to do, especially from funders who are not aware of impact measurement costs. At the other end of the scale, sometimes it's hard to be confident in saying 'no' to doing certain things. (e.g. where an analysis such as SROI is not appropriate).

We work in messy 'laboratories' and not closed systems. Other factors will certainly have a bearing on the change we are seeing, meaning attribution is an almost impossible dream and assessing our contribution is far more realistic, while still often challenging.

To deliver value for money in the long term we do need to make sure we're applying the right kind of impact practice for our work. This can help to create robust processes and better funder relationships as a result.

What we've found works

We've found it's best to start small and not run before we can walk, whilst not being afraid to try things and know that it won't all be easy. Some of us have found that getting some expert support and input can give us robustness, a seal of approval and more profile in areas where we feel less confident.

SAMARITANS

At Samaritans we worked with a consultant from Charities Evaluations Services (CES) to help us develop our new strategy using the theory of change model. This enabled us to clarify our aims and objectives through an across-the-organisation consultation process. It was important for us to feel we were 'getting it right' and that we had a strategy that would enable us to measure our impact. Working with CES also helped us to further develop our impact knowledge and skills which will benefit future evaluation projects.

For others amongst us, we’ve gained more from conducting our impact practice in-house.

At Student Hubs it’s always felt right to keep impact analysis within the staff team rather than contracting external evaluators. It is so important that our staff understand why impact is important and engage with it, rather than seeing it as something which is done 'to' them by external evaluators. As a result we've had to make sure that our impact analysis is really focused, to avoid taking too much time away from delivery and the other functions of the charity. We feel that our impact methods and reporting should be easily understandable by all of our staff and students - if it isn't, that suggests that it is becoming disproportionate to our (small!) size. We've also found that our funders are very understanding, and often impressed enough that we do something on impact rather than nothing!

Applying the right resources is about staff time and focus as well as budget. Although everyone has responsibility for impact, we’ve found it helpful to have particular roles with the expertise or enthusiasm to drive areas of impact practice, particularly around the more technical aspects. Allocating staff resource in the appropriate way can also send a message about the importance of impact to the organisation.

At Safe Ground, whilst managing a large-scale independent evaluation, it became clear that we had a real need for extra support to define the scope, negotiate questions and make sense of the information. A member of staff working on our prison programme was taking a particular interest in supporting the work and helping to manage the independent evaluator. We recognised this staffing need and her effort and worked with her to define a new post in research and policy that became responsible for evaluation, and which she took up. A couple of years later we observed that the whole nature of our environment around evaluation had changed. We needed to use the information about what was working to define new products and make them saleable. So we restructured our senior management team and created a post for a business development director who had responsibility for using evaluative information in this way. This has helped us to ensure we have appropriate staff resources to facilitate our impact practice.

We’ve found that our relationships with funders are really important when ensuring we are able to be proportionate and appropriate. Sometimes we’ve needed to communicate the robustness of our existing impact measurement to our funders. At other times we've needed to challenge funders on their expectations of our impact measurement and reporting. For this, it helps to know what resources it takes you to create the information they might be asking for.

In the evaluation team at Citizens Advice we've determined the resources required for following up with clients via different approaches. This evidence can be used by each bureau when setting appropriate monitoring requirements with their local funders. Furthermore, national outcomes and impact research can be used by bureau and complemented by local evidence.

It's easy to get carried away collecting evidence of our impact or spend a lot of time collecting the wrong evidence or using the wrong method. Many of us have needed to play around with new ideas for the most appropriate way to collect evidence from different kinds of service users. Using the right method has helped us to more accurately demonstrate the change we've made.

At NDCS we do a lot of direct work with children and young people and do struggle to work out the best tools to use with them to evaluate outcomes. We have been wedded to paper based questionnaires, which children and young people find boring and are not motivated to complete either at all or with any real engagement (i.e. they're inappropriate). We wanted a way to make it a bit more interesting for the children and young people, meaning they were more engaged and therefore gave us better data. We have recently invested in "ActiVote" electronic voting pads – Ask the Audience style – which means we can ask young people evaluation questions and get the (anonymous) responses in real time. More importantly, the children & young people are engaged with the tool which hopefully means they are giving responses that are more thought out. We've only piloted them far but plan to roll them out.

We're also mindful of the resource that we ask of our partners and beneficiaries in providing information about our impact on them. We've tried to do as much of the work 'in-house' as we can so that the tasks we ask of them are not too complex or onerous.

At GlobalGiving UK we are fortunate in that we are capturing data automatically on our partners – how they use our services, how they respond to our feedback and the impact over time of being on our online platform (globalgiving.co.uk).

We work with smaller charities doing great work but often with limited resources. Therefore, when we want to measure our impact our systems must be clear, simple and, importantly, not time consuming for our partners.

To achieve this we have explored the "big data" we have been capturing for the last five years, have analysed surprising findings and discussed hypotheses with our partners. We have then built an "effectiveness dashboard" for all our partners which automatically updates as partners interact with our platform. Our intended aim is to encourage learning and curiosity in our partners, improve effectiveness and capture our tangible impact without any financial cost for our partners. This is very much an iterative process and we are still learning and improving – but, importantly, this allows us to begin to measure our impact in real time without over burdening our partners to respond to endless surveys, focus group discussions and other feedback.

Finally, we are careful to be realistic overall in our impact practice. This means tying it to purpose (see principle 2) as well as focusing on our contribution and acknowledging that of others, rather than pursuing unrealistic goals of attribution.

At British Heart Foundation we are always mindful of our Theory of Change. We strive to define the benefits and impact that are expected to occur at the start of an activity. This keeps the evaluation on track and in turn ensures that the right methods and resources are applied for realistic evaluations. We acknowledge that our evaluations will evidence our contribution rather than direct attribution and keeping this in mind ensures proportionality and appropriateness of methods and resource at all times.

Principle 5. Consider the full range of the difference you actually make

No one sets-out to deliver bad services or create negative changes. Yet, we recognise that we still need to capture information that will help us to understand when things haven't worked and not just to look for information that supports the outcome we hoped for.

This means considering 'unknown elements' when we define our impact measures and when we do our analysis – something that can feel vague and theoretical (you don't know what you don't know!). Added to which, the impact we have can take an extremely long time to be realised and if we only consider what has changed in the short-term things can actually look like they're getting worse (since our interventions often involve people addressing serious and negative issues). Unfortunately, stakeholder demands – especially from funders – often push us towards a shorter term view than is required to consider the full range of the difference we have actually contributed to. Conversely, some funders might only be interested in 'hard' long term changes (e.g. new employment) at the neglect of shorter term 'softer' changes (e.g. increased confidence).

In practice, we are firm believers that 'you shouldn't sacrifice good at the altar of great'! Whilst we want everything we do to be exceptional, we (reluctantly) accept that when it comes to our impact practice this means doing the best we can. Considering the full range of our impact can be messy and complicated, though doing so adds enormous value to our organisations, the work that we do, and those we do it for.

For instance, we have often learnt quicker and faster from our failures than from our successes and, by seeking a fuller picture of our impact, we have been able to draw out unintended and intermediate changes, as well as gaps, barriers, and challenges to what we are trying to achieve. The honest and balanced assessment of our work that has resulted has greatly helped us in our strategic planning and in making sure we are using our limited resources as well we can.

What we've found works:

Through our own impact practice we've found that, in order to consider the full range of the difference we've actually made, it's greatly helped to have a really clear vision and mission setting out the direction and boundaries for our ambition. Knowing what our core focus is, we can then expand appropriately from this point to look at the other changes we might make, other beneficiaries we might affect, as well as our impact in the longer term.

At Citizens Advice, whilst outcomes related to advice remain the cornerstone of all our work on impact, the organisation has now widened its impact focus to consider the value of its education work, its social value, its policy and campaigning activities and the longer term impact of advice on clients' lives.

We at British Heart Foundation are also interested in intermediate and unintended outcomes and impact, particularly because much of our impact will not be demonstrable for many years. However, we also have clear questions we expect to be answered within our evaluations and acknowledge that impact can often be intangible.

We've also found that it's much easier to consider the full range of difference we have actually made by involving and listening to various stakeholders when planning and analysing our impact. This has often meant working with service users and those who are directly responsible for delivery on areas that we may not have done so in the past.

Every year at Student Hubs we conduct a 'blind test' on our Theory of Change by inviting students who are unfamiliar with it to identify what they think our outcomes are. This enables us to check whether those at the grassroots agree whether our theory is working, and also enables us to identify any unexpected outcomes that we hadn't planned for - we can then follow these up to check whether we have actually created any of those outcomes as a result of our work.

As well as outcomes associated with our Theory of Change, we also look at the impact we've had on the environment, our local community, our staff and our volunteers. This helps us to understand how the way that we run our organisation impacts those around us, and how we can operate in a more ethical and sustainable way.

Collecting qualitative information (e.g. through quotes and stories) has helped some of us to find out about a wider range of difference that we're making, even where we hadn't necessarily anticipated it.

SAFE GROUND

Safe Ground collect quotes from prison officers and document the stories that men tell them when they go into prisons. This information is really useful to them as it reveals the changes they're creating that they hadn't necessarily planned to, or that they hadn't planned to capture.

Safe Ground also look at a wide range of outcomes in relation to the men they work with, including on: health and wellbeing, attitudes and engagement in other services. They consider changes in behaviour once the men have left prison, such as progression into education, training or employment. They also look wider than the individual men they work with, considering impact on family relationships.

In addition to involving a wider range of stakeholders, it has still proven useful to have designated people with specialist skills to help us consider the full difference our work has made. In particular, this has meant being able to use more proportionate and appropriate methodologies (e.g. using economic approaches to evaluation has proven helpful for some of us, although it's highly specialised).

It's also been essential to use the information we've received, to both improve the way we do things and to inform our strategic direction. We try to avoid attributing blame where things haven't worked. Instead, we strive to use such information as opportunities for learning, thus encouraging a supportive culture that promotes learning and growth within and beyond individuals and our organisations (see also principle 7).

globalgiving.co.uk

At GlobalGiving UK we are open internally and externally about both our successes and failures. We believe that to truly capture the full impact we are making we need to be honest about what has not gone so well and why.

For example, we run a Gateway Challenge programme for smaller charities. This is to help our partners improve their skills in online fundraising and communications. They then practically apply these new skills in a fundraising challenge to ensure learning is cemented. We found that our survey following training sessions and after the challenge was not fully capturing the value gained for our partners and did not contain enough robust data to improve our training in an informed way. This may be because people now fill in many online surveys and so they need to be shorter to encourage participation and also because the full value of the training may be realised later.

We have therefore amended our survey, instigated 6 and 12 month follow up analysis through semi structured phone interviews and are capturing better baseline data at the beginning of the programme. Through this we intend to further improve our training and increase our impact.

Principle 6. Be honest and open

Being open and honest is a simple principle to agree with, but a tricky thing to apply in practice. All of our organisations understand and would sign-up to this principle. However, against the backdrop of a challenging financial environment, actively bringing this principle to life is not always the first thing we might think to do. That isn't to say our organisations are in any way dishonest but rather that actively bringing this principle to life requires both the resources and the courage to make it happen.

For example, telling others that something hasn't worked, that positive change hasn't happened or that – worse still – negative change has happened, is not an easy decision. Sharing our 'failings' sometimes leaves us feeling very vulnerable within a climate of increasing scrutiny and criticism, something which actually encourages our organisations to take a more defensive stance rather than be more open. Equally, at a practical level the sensitive nature of the work we do also means we have to be very mindful of the confidentiality of those we work with. All of this means that, as impact practitioners, we frequently find ourselves fighting external conditions to promote a different culture for our organisations than these pressures might encourage.

Despite this, experiences overall suggest that rather than reducing opportunities for funding, the learning and credibility that can be gained through our openness and honesty actually make us more competitive. Many funders appreciate and are more willing to support those who present a balanced view of their impact.

Openness and honesty are essential qualities in the leadership behaviours we expect within our organisations so continuing this approach with external audiences is just being true to our values. To put it simply, being open and honest is just the right thing to do. After all, we exist to help our service users, not to protect our own interests.

What we've found works:

On the whole, we find being open and honest comes most easily within an environment focused on learning and development. To help create this kind of environment we bring balance to our findings by placing learning in context, draw on several sources of data and ensure our strategic direction provides the framework for our considerations.

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In December 2012 the GlobalGiving UK team conducted an in-depth analysis of the impact of all our programmes since inception (2008). We prepared for this evaluation by nurturing a culture of openness, honesty and creativity in the team. This was critical in setting the tone for creative and rich discussions and every staff, volunteer and board member feeling that their voice mattered.

After reviewing and interpreting all our existing data and experiences it was clear that whilst we had made notable progress in achieving our mission, we were also delivering other programmes seeking to support our partners but without clear measurement. In our start-up phase we had rightly tried a number of different methods and approaches to helping smaller charities access more funding – some were successful –others not so much.

It was only by being very honest with ourselves and analysing the data with a conscious awareness of the challenges of positive bias that we were able to accept that whilst everything we were doing was good and valuable, not all of it was great and some of the work was not value for money for ourselves or our partners. As a small charity you cannot do everything – nor should you.

From this we refined and simplified our strategy – linking our programmes and measurement more explicitly to our theory of change. All our work now fits under one of three programme areas – Access to Funding, Access to Skilled Volunteering and Access to Training and Learning. We are committed to helping our partners access the knowledge, skills and resources they need to excel in their work and achieving our wider mission of democratising aid and philanthropy.

We have ended activities that did not clearly link to these areas, or for which we did not have sufficient resources. We now do not take on new activities if they do not explicitly link to our theory of change and our intended impact. This means sometimes taking the difficult decision not to apply for funding from donors.

We work with various stakeholders, including our funders, to develop a common view of key learning. We then share this learning openly with staff and funders (many of whom will already have been involved in identifying it) before communicating important learning widely for external audiences. We make space for being open and identifying lessons – be that in paper template or in meetings.

When it comes to things that haven’t worked well, we find learning is best shared and discussed in person. Doing this in an environment of honesty and openness rather than blame means that people aren’t scared of recrimination or when they choose to speak openly or honestly themselves.

At Citizens Advice all project evaluation briefings contain a section for key learning, encouraging challenging or unexpected evidence to be considered. The CitA Impact and Evaluation team have monthly meetings dedicated to talking about the 'lessons identified' in current evaluations, discussing how these can be turned into 'lessons learnt'.

Where we can we are also honest and open in feeding the information we have captured into other, sector-wide, sources of information. This contributes to an even bigger view of what is changing for those we want to make a difference for (see also principle 8). This data can help all of us working for a particular group of beneficiaries to make better decisions for that group with regards to what can make a difference (whilst respecting the confidentiality of our beneficiaries).

Safe Ground were the first charity to publish their results in reducing reoffending on the Ministry of Justice Data Lab. The Justice data lab is a way for organisations to access central reoffending data, the result of charities lobbying because they didn't have access to this kind of data about men they work with, despite the Ministry of Justice citing it as the change they wanted to see. Charities submit their data in a certain format and the lab will prepare a matched pair control group from their data on reoffending rates. The resulting report is published on the Ministry of Justice website. Safe Ground felt that there was huge benefit to them in using this service to find out what difference they had made to reoffending rates. In leading the way by publishing their results on the MOJ website they wanted to support genuine learning about what works and encourage a culture of openness and dialogue for improvement. All of Safe Ground's evaluations are published on our own website as well.

Principle 7. Be willing to change and act on what you find

It's something of a cliché to suggest people have varied responses to change, but cliché is borne out of well-trodden experience, and it's certainly our experience that people don't always respond positively to change! Improving impact practice is effectively a change process – impact is always about social change and changing impact practice is also about changing how our organisations, and the people in them, do things. So applying this principle has involved a good deal of preparing ourselves and others for change.

This is easier said than done: whilst the evidence we present may seem rational (based on sound data and analysis) the response to this is not always so. This is especially true where tough decisions are required about how to use our limited resources to make the greatest difference (something everyone cares so passionately about). When change is required we are often already delivering work, so altering things mid-flow can be complicated.

Findings that suggest change is required affect people on a personal level and these findings can be difficult to share or to receive. Equally, for many of us, our work streams have a deep history based on the belief that what is being done is the 'right' thing, so anything that challenges this might also be challenging a deep seated set of beliefs. Doing things differently requires creative thinking, which is not always easy for everyone, especially if they've been used to certain ways of doing things for a long time.

We persist because, whilst there can be some short term pain, there is much to be gained in the long term. Being willing to change and act on what we find represents an excellent opportunity for us to develop what we do in partnership with those who use our various services, which is another way to engage and stay connected with those we want to help. This has also proven inspiring for many of our staff as it gives them the confidence to challenge what we do and how we do it, to be even more innovative. Similarly, being willing to change and act on what we find has also meant that we have been able to share what we do and our learning even more widely than we would have been able to otherwise, leading to more partnerships, more creativity, and better ways of doing things for our beneficiaries.

What we've found works:

To make sure learning leads to action we do a number of things to ensure our organisations see opportunities where others might see problems. People are clearly essential to putting learning into practice, so we pay close attention to the human aspects of change and we involve people by offering a variety of leaning opportunities and by empowering them wherever we can (for example, by creating an evaluation champions network).

Ultimately, by being open and honest, whilst involving various stakeholders in analysing our impact data and drawing-out learning within a wider context, we are encouraging these stakeholders to be active participants in answering difficult questions and addressing the possibility of change at an early stage. This can result in these same people then acting as co-creators where change is required (something we have found especially useful for delivery teams).

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At GlobalGiving UK we make sure we identify areas and ideas for change through a shared monthly review of our performance in different programmes (with staff and volunteers participating) and then a 6 monthly strategic review of our work. We used to rely on an annual review of our work but have found that as things move faster and data is more readily available we should seek to make incremental changes to our work more quickly. This is about being as responsive and adaptive as possible as we seek better impact.

An example of a radical change we made is to the coaching programme we used to run for partners, connecting them with executives from a corporate organisation. We intended to help our partners improve their leadership and governance skills using skilled volunteers. Unfortunately there was no funding for the programme – which meant that GlobalGiving UK did not have sufficient resources to invest in coordination between the corporate and partners. The evaluation revealed a key challenge - fundraising skills were perceived as a critical part of successful leadership and governance for our partners – but these were not skills that our corporate partner possessed.

Furthermore, without curated support from GlobalGiving UK calls got dropped and there was miscommunication. Some great individual work was delivered but the positive impact of the programme was limited for the resources invested.

We noted the learning and halted the programme. Two years later we have used this learning and experience to plan, fund and execute a Communications and Marketing Mentoring programme with a corporate with the necessary skill set for 30 of our partners. We got it wrong the first time, but are getting it right now after Listening, Acting, Learning and Repeating.

SAFE GROUND

At Safe Ground we conducted an evaluation of a programme that we had run for men serving a life sentence in prison. Despite the programme having great results in other settings, we were surprised to find that it wasn't making the difference we had hoped in the 'lifers' setting. The men fed back that they didn't find the content appropriate, feeling the literature and set texts were too basic for them. We found this very interesting and on discussion internally reflected that we know that a lot of men in prison have a university degree and that the education level of those serving a life sentence is often higher than others. This new information helped us to think more clearly about how we target this programme. It's no longer considered appropriate for 'lifers', instead targeted at shorter service, category C, men who are closer to release. We carried this thinking over to other services, such as our 'what next' days, which are also targeted at those prisoners closer to release.

We've found that it's hugely important for learning and action to be supported by our board and senior managers, who have a particular responsibility for ensuring whatever actions are taken fit into our general strategic approach. But ultimately we have also found that changing and acting on our findings has required support from the whole organisation.

student hubs

Connecting students with causes

Every two weeks the Student Hubs Management Team meets to discuss our latest outputs and outcomes data, how our progress to date compares to the same period in previous years, and how well we are doing against targets. This means that we can spot problems early on and bring in people with the right expertise to suggest improvements and changes before issues become too entrenched. As a result, we have made hundreds of changes to our work, some very small and some very big - one recent example is making a change to the way that we collect student data to streamline this process and make sure we communicate with them in an effective way. We also compare outcomes from all of our different events and conferences to identify successful/unsuccessful innovations and share them amongst our network.

Principle 8. Actively share your impact plans, methods, findings and learning

We strongly believe in this principle: if we didn't then we wouldn't have taken part in The Code Learning Forums or produced this document! That doesn't mean it's easy, though. Not only can it be challenging to carve out the time and space for doing this but it can also leave you feeling 'exposed'.

In our very first meeting of The Code Learning Forums we reached an immediate consensus – that none of us were sure we had particularly good impact practice, despite others telling us we had! In truth, our experiences suggest that there is always room for improving your impact practice, that it isn't about doing it perfectly but about doing it as well as you can.

This presents a tricky balance between having the courage to celebrate what is 'good' about our impact practice whilst also remaining open to doing it even better. This generates a degree of anxiety: others might not think our approach is 'good enough', we may be open to criticism by funders or those 'competing' for funds, we may not receive feedback or reciprocal sharing that can help us to improve.

How to go about sharing learning from our impact measurement results is also a challenge. We are all busy and finding the time when we can share our learning, and at the right time, is not always straight forward. Nor is it easy for our organisations to support us in doing this amongst many competing demands and inevitably limited resources. Even if we can find the time and encouragement to share our learning it isn't always clear who we should share it with, what opportunities exist for doing so, what information people will be interested to hear and the format they will best respond to.

But by sharing our learning and hearing about the experiences of others – good, bad, and indifferent – we've been enthused and gained ideas to go back and further improve our own impact practice and the work we do, something that will make it even more credible in future. This is a key part of developing a culture of learning and will benefit not only those working within our organisations now but also those who follow us. Crucially, all of this will help us make a greater difference for those we are here to serve and there is no more compelling reason than that.

What we've found works:

We've found it's important to be clear from the outset what the purpose of sharing is (why we are doing it and what is in it for ourselves and others) whilst also being clear about the boundaries of what we are willing to share (especially respecting confidentiality).

Equally, sharing everything for everyone isn't that helpful, so we make sure we are clear about our audiences, their expectations, and what they might be interested in. This includes using a variety of approaches to sharing learning about our impact practice externally, from attending networks such as this one, to blogging, producing and publishing reports, as well as speaking at events and so on.

At the National Deaf Children's Society we have worked hard with staff to try and be a bit more creative in how we share our findings. We have traditionally been stuck on a long narrative report to communicate our evaluation findings internally – e.g. putting a 10+ page report in the staff newsletter that no one reads. Now we encourage a "less is more" approach – such as a one-page of 'key findings' that summarise each evaluation and we do more to talk to people about these key findings and their implications.

For some of us, standardised measurement frameworks have proved particularly useful for comparing and sharing learning with external audiences. For others, just sharing our research and evaluation findings has helped to advance the practice in the wider sector.

The impact research into how ready Citizens Advice Bureau (CAB) clients are for Welfare Reform changes, and the evaluation of how effective CAB interventions can be to move clients to be ready, has been shared and built upon by partners and other organisations throughout the sector and we have played an active role in sharing our learning so this could happen.

We also make sure we provide many opportunities to engage with internal audiences around our impact practice. We've found that providing frequent and timely feedback to those who've contributed to impact and impact practice, particularly internal contributors, is an important part of generating and maintaining a culture of learning and ensuring on-going support for our work.

The NDCS Listening Bus® travels across the UK, reaching families in remote areas who may have no way of accessing our services locally. We spent many months working with the Bus team to improve their impact practice. They did a great job of collecting and analysing data, becoming more and more skilled and enthusiastic about the process along the way. They wrote up their findings and shared them really widely, including to our Executive Director team, through a variety of communication methods. This really raised the profile of the Bus internally, helped everyone to understand the impact it made for the families, and supported Executive Directors to make budgetary decisions. Furthermore, the impact information helped to secure £35,000 of external funding for a new Bus. The motivation and boost that the team got from seeing the fruits of their labour was brilliant.

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