

SU.5.3.1 – Impact measurement Cycle.



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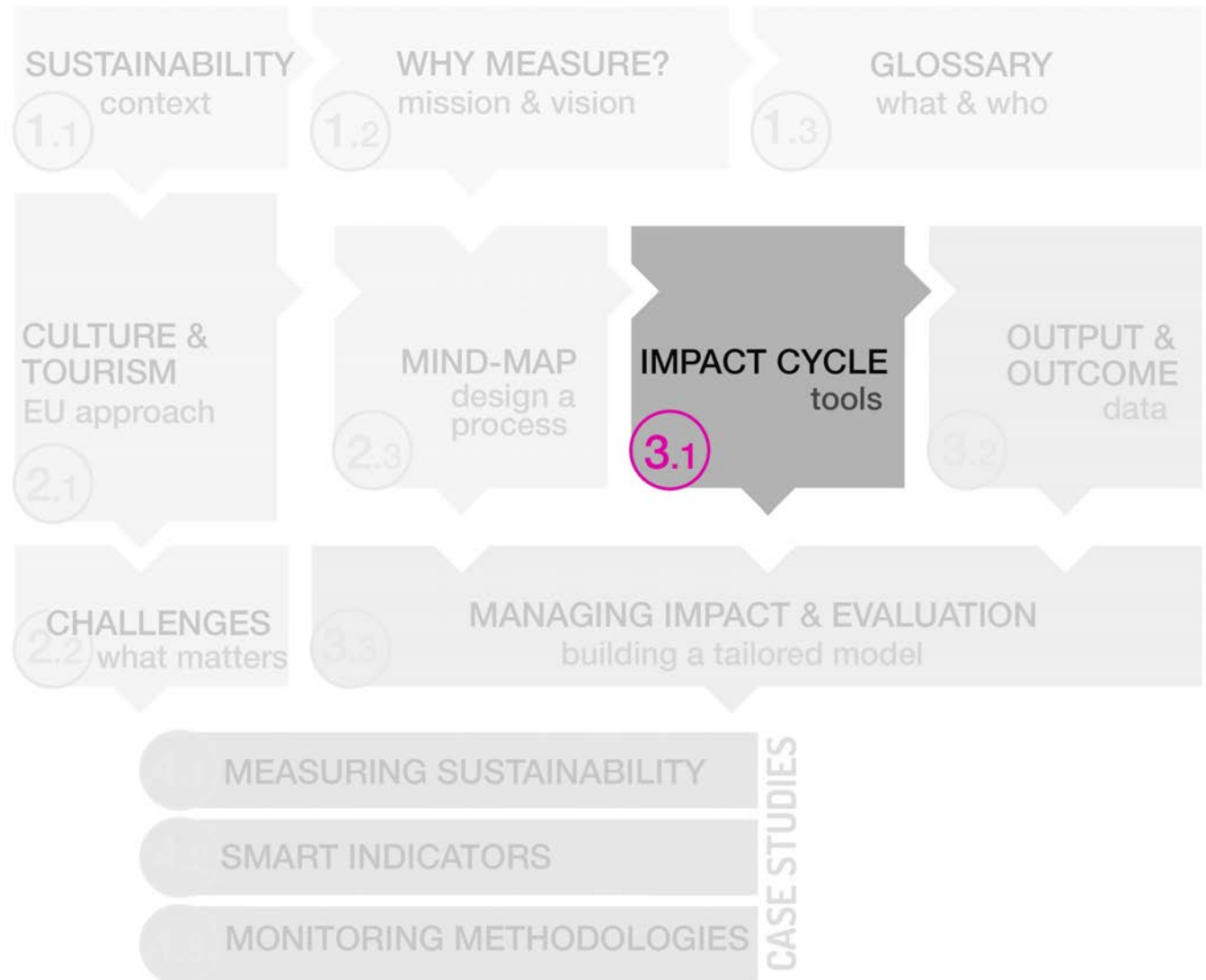
**Methodologies
already existing**

Closing section

To continue your
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Aim & objectives

- The objective of this unit is to have references **to design a your own measurement cycle** based on the methodologies already existing and useful to integrate in the strategic vision of cultural heritage professionals in their realities.
- Educational Strategy: Develop a **measurement cycle for a specific challenge detected**, defining the different steps of the evaluation process, from planning, scoping, design, conduct and reporting of results.



What will you learn. Learning outcomes

At the end of this presentation, you will be able to:

- Learning outcome 1: Construct the necessary process to develop a project of social impact cycle **by inspiring in the existing tools and tailoring to your own cycle**
- Learning outcome 2: Evaluate the key **phases of the measurement** cycle, for each specific project, to identify the information and resources needed for development.





Keywords & terms

Impact measurement cycle steps

Evaluation

Monitoring

Setting Objectives

Analysing Stakeholders

Measuring Results

Verifying and Valuing Impact

Reporting



Background

At this point of the module you have the knowledges to understand what measurement social impact means and a general overview of the methodologies develop in different sectors (ex. social sector, cooperation, corporate responsibility) and also in cultural sector.

In this sub-unit is the moment to start to think on your how to design your own measurement process.

- Which is your starting point?
- What are the basic steps to do it?
- What measurement actions you have to implement?
- How you are going to generate evidences, through monitoring or evaluation actions?



SECTION 1

**Impact measurement
cycle: which is your
starting point?**



Impact measurement cycle: Which is your starting point?

- Which is the starting point of your entity?
- Which is your previous experience in measuring?
- Which are your possibilities to push for a measurement journey?

"We are new to the area of measuring social impact and are looking for advice/resources to get started"

"We have tools and processes in place to measure social impact and are looking for ideas on how to improve"

"I have a role in measuring social impact in my organisation and I am personally interested in learning more about the topic"

"I'm responsible for funding not-for-profit organisations and want to be able to talk to them about measuring their social impact"

Which is your starting point?

| Level | Expectations of your measurement journey | Some actions/tools |
|-----------------------------------|---|---|
| 1—BEGINNER (White belt) | <ul style="list-style-type: none"> • Need assessment • Set a monitoring system. • Identify evidences to build a future strategy of measurment • Aligned indicators with your strategy | <ul style="list-style-type: none"> • Theory of change • Understanding the measurement journey |
| 2—ADVANCED (Green belt) | <ul style="list-style-type: none"> • Montoring indicators (process & outputs) • Evaluability assesment • Process evaluation • Aligned indicators with your strategy | <ul style="list-style-type: none"> • SMART indicator • Result chain: Output, outcome, impact |
| 3- EXPERT (Black belt) | <ul style="list-style-type: none"> • Result Evaluation • Impact evaluation • Value for money evaluation • SDG impact assessment | <ul style="list-style-type: none"> • Evaluation matrix • Better evaluation • Social Value and Sustainability reporting |

SECTION 2

Methodologies
already existing

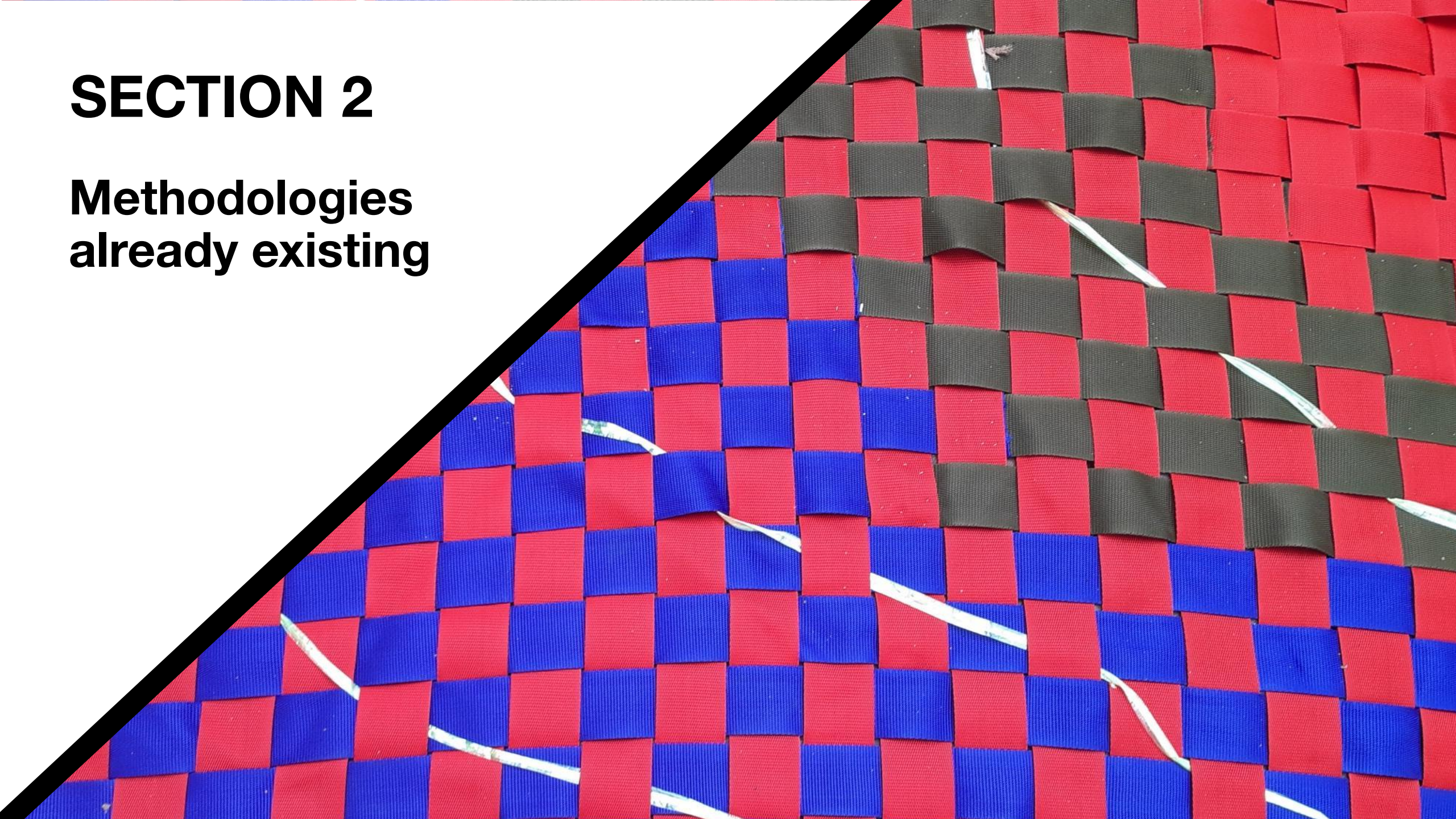




Figure 3:
The EVPA five-step impact
measurement process

Source: EVPA



Which is your starting point?

Main reflections

- **not “reinvent the wheel”**
- Most important than identify tools is **to design your own “measurement cycle”** based on these methodologies already existing.
- **Each measurement journey is unique: Be inspired by reviewing the existing methods**
- Having in mind the need to generate evidences of cultural heritage impacts requires a mixed set of skills and actions in cultural heritage professional: experience of engaging stakeholders, outcomes measurement or evaluation, implement a culture of measurement...
- Too complicated or jargon? **Adapt tools and concepts to your own measurement journey**

Practical tools: measurement cycles



Tool# 1- 7 Steps to effective impact measurement

7 STEPS TO EFFECTIVE IMPACT MEASUREMENT



Beginner's Level – White Belt

- inFocus Enterprises is a social impact consultancy firm, specialising in **social impact measurement, strategy and evaluation**
- This guide addresses the social value challenges by taking you through seven steps, from deciding on an approach to measuring social impact through to using data effectively to improve programmes and drive fundraising and growth.

Practical tools: measurement cycles

Tool# 1- 7 Steps to effective impact measurement

This guide will take you through 7 Steps to measuring social impact:



Step 1: Decide on your overall approach to measuring social impact by developing a vision, deciding how to measure social impact (whether to use monitoring, evaluation and/or research) and who to involve.



Step 2: Decide what to measure by exploring mapping out your programmes with programme theory and how to prioritise and use learning questions



Step 3: Select/develop indicators that will identify what has take place as a result of running your activities and to what extent



Step 4: Plan your data collection by selecting the right data collection method, taking a quality approach to sampling and finalising your indicator framework



Step 5: Develop data collection tools (we focus on questionnaires in this guide) to collect high quality data



Step 6: Collect and manage your data through effectively deploying data collection tools, ensuring the data you collect is high quality and secure, and selecting the right software for your organisation



Step 7: Use the data you collect: effectively analyse and learn from your data to improve the delivery of your activities, your fundraising and your accountability back to stakeholders.

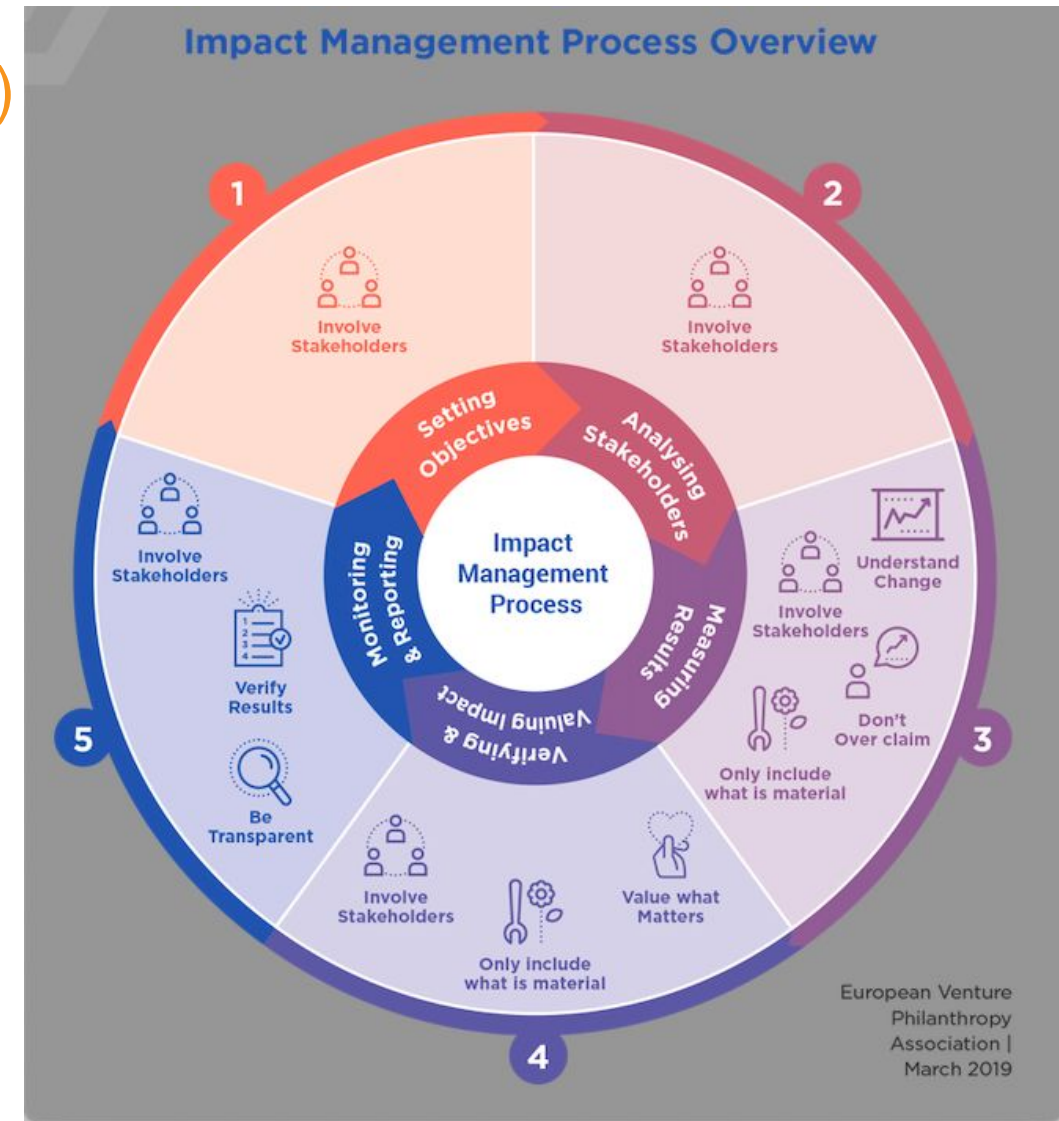
Practical tools: measurement cycles

Tool# 2- Impact Measurement Initiative (IMI)

Advanced Level – Green Belt

European Venture Philanthropy Association (EVPA)

- “A practical guide to measuring and managing impact”: manual on impact measurement; a tool and a practical road map on how to actually implement it.
- **Impact measurement system** is composed of the following steps:
 - Setting Objectives
 - Analysing Stakeholders
 - Measuring Results
 - Verifying and Valuing Impact
 - Monitoring and Reporting



EPVA - Impact measurement in practice - In depth case studies

<https://evpa.eu.com/knowledge-centre/publications/impact-measurement-in-practice-in-depth-case-studi>



Practical tools: measurement cycles

Tool# 2- Impact Measurement Initiative (IMI)

Setting **Objectives**

The Theory of Change is at the centre of all you do, so take the time to develop it!

The Impact Measurement System you choose to build (derives from your goals) and they are unique

Analysing **Stakeholders**

Consists of two sub-steps: stakeholder identification and stakeholder engagement

Measuring **Results**

You measure for yourself, so assess what data is useful.

You can't measure everything (and you shouldn't)

Don't overdo it – sometimes two to three indicators per objective are sufficient

Verifying **and Valuing Impact**

Involve the beneficiaries –

Combine quantitative and qualitative data

The learnings will then need to be reported

Monitoring **and Reporting**

Data collection is a learning process

No reporting standards exist, but a number of elements are common in reporting the results

Practical tools: measurement cycles

Tool# 3- Better Evaluation

Expert Level – Black Belt

- Better evaluation is a measurement tools repository
- It provided tools and guides for Monitoring and Evaluation
- **Manager's guide to evaluation:** a step-by-step guide that organises the tools according to the logical development of the process.

Choose methods and processes

You need the right mix of methods to answer your evaluation questions and the right processes to plan and implement an evaluation. Choosing the most suitable methods or processes depends on the nature of what is being evaluated, the nature of the evaluation, and resources and constraints.

[Learn more](#)

About Better Evaluation

<https://www.betterevaluation.org>



SECTION 3

**How to generate
evidences:**

**From Monitoring to
impact Evaluation**



Supporting
evidence-based policy
making – AAM consulting

http://www.aamconsulting.eu/service/Monitoring_Evaluation-24





How to generate evidences: Monitoring and Evaluation

- Main **ways in which you can measure** social value: Evaluation and Monitoring.
- **Measuring performance (monitoring) or results (evaluation)** can be implemented at several degrees
- Evaluation & Monitoring actions can be implemented alone or in combination
- In both case, why to measure?

Accountability

The evaluation will **assess the performance** of the [project/ programme], this is, the level of attainment of results as initially planned.

Learning

Measurement will allow to development of conclusions, evidenced-based, that should facilitate **operational and strategic decision-making** on future programming or actions.

Result-oriented management

Implies focusing first on the desired change (Outcomes/Impacts), and the results we want to achieve) instead of starting with the planned inputs and activities first.

How to generate evidences: Monitoring and Evaluation

Monitoring

to **generate, in a continuous and systematic way, evidence on the implementation** of the visitor programme, cultural heritage project or actions.

to control exclusively the **good execution** of the entity/ project/ programme's activities:

- 1) Whether the activities are being carried on as planned and
- 2) What is being directly achieved through these activities (outputs)

It is also a **long-lasting and continued process, gathering evidence** during all the lifespan of the organization/project assessing the correct implementation

Evaluation

is an **evidence-based judgement** of the extent to which an existing intervention has performed (or is working), on the basis of specific criteria

Evaluation goes **from process to impact evaluation and assessments.**

to **draw conclusions about the causal effects (results) on the target population**, seeking to identify any unexpected effects.

usually **planned at a specific time**, at the end of the implementation of a project or when you want to make changes in the strategy.

How to generate evidences: Monitoring and Evaluation

Types of monitoring and evaluation methods & Timing

| | | |
|---------------------|-----------------------|--|
| TYPES OF EVALUATION | Before implementation | Needs assessment |
| | | Evaluability assessment |
| | | Evidence synthesis |
| | During implementation | Monitoring |
| | | Process evaluation |
| | After implementation | Impact evaluation |
| | | Value for money evaluation |
| | | Sustained and emerging impact evaluation |
| | | |

How to generate evidences: Monitoring and Evaluation

| WHAT | FOR WHAT | HOW |
|------------|---|--|
| MONITORING | Inform about what is the Programme doing and how much implementation is progressing | Measurement and follow-up of OUTPUT & RESULTS indicators |
| | | Qualitative assessment of progress |
| EVALUATION | Inform about what is the Programme achieving in terms of awareness impact (as well as confidence, perception, consumption, etc) | Measurement of IMPACT indicators |
| | | Quantitative & Qualitative assessment of Evaluation questions |

Evaluation differs from Monitoring to the extent that the former goes beyond:

- an **assessment of what** has happened;
- it considers **why** something has occurred (and what links, if any, can be made to the role of the cultural heritage action implemented)
- and, if possible, **how much** has changed as a consequence.

How to generate evidences: Monitoring and Evaluation

Evaluation criteria:

RELEVANCE

- ❖ Relevance looks at the relationship between the needs and problems in society and the objectives of the intervention and hence touches on aspects of design.

EFFECTIVENESS

- ❖ Effectiveness analysis considers how successful the action has been in achieving or progressing towards its objectives, using appropriate points of comparison (including from a prior impact assessment).

EFFICIENCY

- ❖ Efficiency considers the relationship between the resources used by an intervention and the changes generated by the intervention (which may be positive or negative).

COHERENCE

- ❖ Coherence is associated with two meanings: i) Internal coherence, looking at how the various internal components of an intervention operate together to achieve its objectives; and ii) External coherence, looking at how interventions within the same area and/or policy work together.

Better regulation: guidelines and toolbox

https://ec.europa.eu/info/law/law-making-process/planning-and-proposing-law/better-regulation-why-and-how/better-regulation-guidelines-and-toolbox_en

How to generate evidences: Monitoring and Evaluation

Evaluation Matrix

- Each of the **Criteria is a question (or a group of questions) searching for evidences**, through data collection tools. Indicators are the measurement for those questions/criteria.
- The evaluation matrix collects this type of information. It will also serve as a tool for summarizing and visualizing the evaluation design and methodology.

| Evaluation Questions | Judgement criteria /Indicators | Data collection Methods/Tools |
|---|--|---|
| 1. How much is/has the action/ programme contributing/contributed to increase awareness on cultural heritage value of the target population (ex. visitors, community.)? | Percentage of people who report an increased awareness on the key messages as a direct result of the Programme. | <ul style="list-style-type: none"> • Visitors/ participants surveys • Documentary review • In depth Interviews with key informants |
| | Percentage of people reached (coverage) | |
| 1. Are changes experienced by participants the same, or different, when desegregated by sex and age? 2. Are changes experienced by participants the same or different, when desegregated by type of target population (ex. visitors, people living around the site...) | Evidence of gender mainstreaming from the action (planning, activities, processes) Evidence of community impact from the action (planning, activities, processes) | <ul style="list-style-type: none"> • Visitors/ participants surveys • Documentary review • In depth Interviews with key informants • |



How to generate evidences: Monitoring and Evaluation

Key evaluation questions: based on scope of the evaluation and the methodology

3. Specify the key evaluation questions

What are the high level questions the evaluation will seek to answer? How can these be developed?

This task does not have specific options but does have resources to help guide you. In addition, be clear about the different types of questions you want the evaluation to answer:

Descriptive question - what has happened? what is the situation?

For example - Where has the program been delivered? What changes have occurred for participants?

Causal question – what caused or contributed to the results?

For example - What were the outcomes and impacts of the program? What other factors contributed to achieving these outcomes and impacts?

Synthesis question – is this good? In what ways could it be better? Is it the best option?

For example - Did service delivery comply with agreed standards? Was the program cost-effective? What were its strengths and weaknesses?

Action question – what action should be taken?

For example - Should the program continue? What changes should be made to the program? Should it be scaled up?

Further resource: Better evaluation. Consider important aspects of the evaluation.

<https://www.betterevaluation.org/en/node/5295>

How to generate evidences: Monitoring and Evaluation

Monitoring Example: **Enhancing our Heritage (EoH) project**

- EoH project aims to develop a framework for assessing the **management effectiveness of natural World Heritage** (World Heritage) sites in pilot sites across three continents.
- It describes the project and the relationship between the project's objectives and the **monitoring requirements contained within the World Heritage Convention**, discusses some questions regarding the application in both **natural and cultural World Heritage sites**.
- EoH project is using the six elements outlined in IUCN's World Commission on Protected Areas (WCPA) Framework for **Assessing Management Effectiveness** (context, planning, inputs, processes, outputs and out- comes) to build assessment systems suitable for World Heritage sites, and testing these in the pilot sites

UNESCO (2004): Monitoring World Heritage

https://whc.unesco.org/documents/publi_wh_papers_10_en.pdf

Applying the *Enhancing our Heritage Toolkit* to Cultural World Heritage Sites



Ensuring the artistic and architectural integrity of very old structures is a constant challenge for many cultural World Heritage sites such as in Fatehpur Sikri, India.

SECTION 4

Basic steps in your measurement journey





Basic steps in your measurement journey

Final reflections

- Identify your starting point: beginner, advanced, expert
- **Measurement always involves different actions and degrees of Evaluation and monitoring:** from performance toward impact assessment.
- Existing case-study and methodologies are a source of inspiration to design your measurement journey.
- Most of the methodologies used to follow similar paths.
 - #1- Analysis
 - #2- Strategic design of the evaluation;
 - #3- Measurement actions;
 - #4- Reporting and learning.
- Our case-studies have followed the following steps: the **sustainability and social measurement cycle**



Basic steps in your measurement journey

Sustainability and social measurement cycle

#1 Analyzing your starting point: the measurement journey.

- Which are your reasons to measure?
- Strategy, data and people
- Manage, frame and define your measurement journey.

#2 Setting your own theory of change: mission and vision.

- Which are the desired changes of your cultural action?
- Evaluation tools and matrix (ex. the Intervention Logic).

#3 Measuring evidences: indicators.

- What you can visibilize?
- Monitoring and evaluation.
- Select and tailored data tool collection.
- SMART criteria to select indicators.

#4 Social reporting & recommendations: toward sustainability and learning.

- Which is the value of the measurement journey?
- Understand, synthesize data and key issues
- Accountability, learning and result oriented



Closing section



To continue your learning

Refer to sitography/bibliography that would help the learners to go deeper into the topics:

Read careful **tips and recommendation in each of the steps of the cycle** in the different Measurement Cycle already studied in this sub-unit:

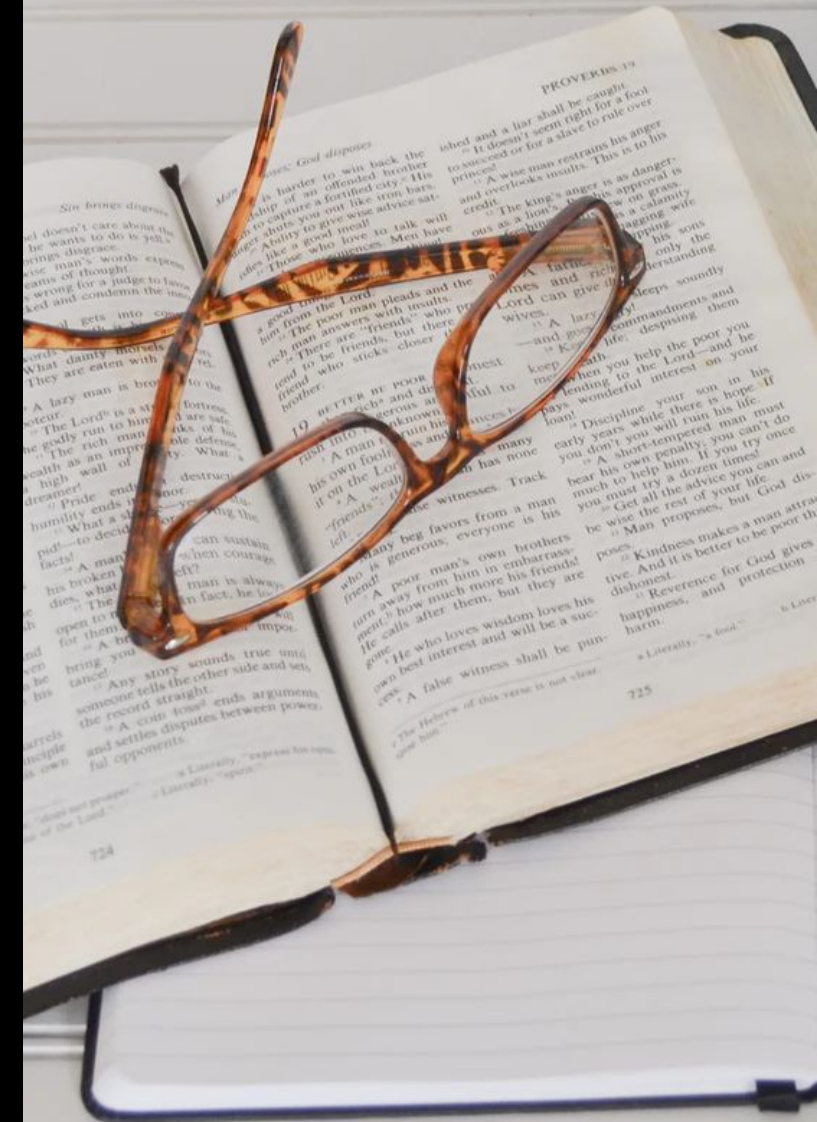
- 7 Steps to effective impact measurement (inFOCUS guide)
- Impact Measurement Initiative (IMI) - European Venture Philanthropy Association (EVPA)
- Better Evaluation Manager's guide to evaluation: a step-by-step guide

Be inspired about the real cases already developed by the UNESCO to monitoring requirements contained within the World Heritage Convention

- **UNESCO (2004): Monitoring World Heritage**

List of references

- OER- inFOCUS ENTERPRISES Ltd (2016): 7 steps to effective impact measurement.
- EPVA - Impact measurement in practice - In depth case studies <https://evpa.eu.com/knowledge-centre/publications/impact-measurement-in-practice-in-depth-case-studies>
- Better evaluation repository - Manager's guide to evaluation https://www.betterevaluation.org/en/managers_guide





Author's & Credits

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Consultant + 15 years & CEO/part of the Directive Board of the non-profit association La Cultora.

Currently its main lines of work focus on: evaluation, monitoring, participative methodologies, knowledge management and how to make visible intangible social impact of your entity/ organization and project.





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