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# DIGITAL INCLUSION EVALUATION TOOLKIT

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A STEP BY STEP GUIDE TO DEMONSTRATING THE  
SOCIAL IMPACT OF DIGITAL INCLUSION PROJECTS



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# INTRODUCTION

This step-by-step guide will help you to evaluate the social impact of your digital inclusion project. You can use this evaluation to show others, such as funders, how successful your project is. It will also show you how to improve your project so it can be even more successful. Evaluation is sometimes referred to as ‘proving and improving’.

Done well, it will help you to:

- Prove what you do to others – showing the impact your project is having on your *beneficiaries* (e.g. participants on a training course)
- Improve what you do – showing you where your project could be improved so that it has an even greater impact

**Beneficiary:**

The people who use your services. You may use another term such as clients, participants, or service users.

As well as helping you to ‘prove and improve’ your project, we also hope that the use of this guide will help to build a picture of digital inclusion services across the UK. If enough projects share their findings using a consistent evaluation approach we can develop a strong evidence base for different types of intervention. This evidence base can then support further funding and investment in this area.

You do not need any experience with evaluation to use this guide. You’ll find all the key terms clearly defined and explained. Whenever we introduce a new term we will explain it in a box on the same page, as shown above. You can also find the full list of key terms in the glossary. There are also plenty of real-life examples from digital inclusion projects.

We have created a separate overview to the whole process called the [Digital Inclusion Evaluation Toolkit Overview](#). This also explains why we have developed the [Digital Inclusion Evaluation Toolkit](#), what we hope it will achieve, and who it is aimed at. We recommend you read it first.

We have also created some additional guides which work alongside this one. We’ll tell you when we get to a stage in the process where you can use one of the additional guides to help you. The guides are as follows:

- [The Digital Inclusion Evaluation Toolkit guide to stakeholder engagement](#)
- [The Digital Inclusion Evaluation Toolkit bank of outputs, outcomes and indicators](#)
- [The Digital Inclusion Evaluation Toolkit survey template](#)
- [The Digital Inclusion Evaluation Toolkit report template](#)



**'Stakeholders'** are all those who are involved in, or affected by, your project, such as beneficiaries, staff, volunteers, and so on. 'Stakeholder engagement' is when you spend time talking to your key stakeholders about your service, such as what impact it has had on them or which aspects they like or dislike. You usually do this through interviews or focus groups as these methods help you gather rich information in an open, often informal way.

Our approach is based on best practice in the field of measurement and evaluation, with a specific focus on local projects that aim to increase digital inclusion.

Three key principles underpin our approach:

- **Stakeholder participation:**  
Involving beneficiaries and other stakeholders from the start ensures that you focus on what matters most to those directly affected;
- **Transparency:**  
An evaluation process which is open and clear enables others to judge for themselves the quality of the evidence. This will increase confidence in your results.
- **Outcome-based measurement:**  
Measuring outcomes, rather than outputs, ensures that you evaluate both the quality and effectiveness of your service. It is only outcomes that can tell you whether a change has taken place for beneficiaries

Take two internet courses, each of which has been attended by 20 participants. However, Course A is much more effective than Course B. 18 out of 20 participants on Course A now use the internet at home. However, only 5 of the participants on Course B do so.

Only an evaluation process that measures outcomes – such as IT skills, frequency of internet use and changes in quality of life – will be able to distinguish between these. In this case, the evaluation could be used to 'prove' how effective Course A is. Equally importantly, it may lead to improvements in Course B. If the evaluation had only measured outputs such as course attendance and completion it would not have shown this difference, and the evaluation would have been of less benefit.



The difference between outcomes and outputs is one of the most important distinctions in evaluation.

**Outputs** are the easily measurable, direct results of activities – such as the number of people that attended an internet training course. They usually only tell you that an activity has taken place, rather than what happened as a result of the activity.

**Outcomes** are the changes that occur for beneficiaries as a result of the activity. Outcomes for participants on the internet training course, for example, could include improved IT skills or increased quality of life.

**This guide takes you through a four-stage process to carry out your evaluation. The four-stages are:**

<b>01 PLAN YOUR EVALUATION</b>	Decide what information you need and how you are going to collect it
<b>02 COLLECT THE DATA</b>	Gather information on your project's success using surveys and other data collection tools. (Note that you need to collect baseline data before your project starts)
<b>03 ANALYSE THE DATA</b>	Find out what the data can tell you about how successful your project is and where you may need to improve
<b>04 USE THE DATA</b>	Prove and improve your project's success

The diagram on the next page shows the full process in more detail and highlights where there is an optional additional guidance or step you can use to help you.

This guide takes you through a four-stage process to carry out your evaluation. The four-stages are:



## STAGE 1:

# PLAN YOUR EVALUATION

Planning your evaluation before you begin will help you to make sure that you collect the right information. It will also save you time later.

This stage will cover:

- A. FORMING A STEERING GROUP TO OVERSEE THE PROJECT**
- B. PLANNING THE EVALUATION PROCESS**
- C. STAKEHOLDER ENGAGEMENT**
- D. DEVELOPING A THEORY OF CHANGE**
- E. SETTING INDICATORS**



## STAGE 1:

# PLAN YOUR EVALUATION



Once you have completed this stage you will have a clear idea about:

- The scope and scale of your evaluation, and who is overseeing it,
- What changes or outcomes your project is likely to be achieving,
- What information you need to collect to find out how effective your project is at bringing about these changes

This guidance describes a mixed methods evaluation i.e. it covers both qualitative and quantitative data collection. Qualitative data is usually narrative and is gathered via interviews, focus groups or participant observation. Quantitative data is numerical and is usually gathered via surveys. The key features of each are summarised below.

QUALITATIVE	QUANTITATIVE
Small sample	Large sample
Can be selective or representative	Aims for representativeness (randomness)
Not used to generalise	Used to generalise
Interviews/focus groups	Surveys/questionnaires
In-depth, qualitative information	Less depth, quantitative data
Thematic analysis	Statistical output

Different methods are appropriate for different kinds of research questions. Qualitative methods generally aim to understand experiences and attitudes. These methods are good at answering questions about 'what changes and how does it change' rather than 'how much change takes place', which are better answered by quantitative research. The Digital Inclusion Evaluation Toolkit process begins with qualitative research to understand what changes take place (through a process called stakeholder engagement). Once you have established what changes are likely to happen, we then try to find out how much change takes place. We call this process data collection.

### A. FORM THE STEERING GROUP.

First, you need to decide who will be involved in overseeing and supporting the evaluation. This might just be a small staff group. Or you may want to include representatives from beneficiaries, volunteers, funders, trustees and other stakeholder groups. The make-up of the group will



depend on what your objectives with the evaluation are. Is it an internal, or external-facing piece of work? Is there anyone you want to influence? Do you need any specialisms, or expertise? We recommend that you keep this as a small group if this is your first evaluation or if it is a small process. For large scale evaluation, we would recommend a wider group. We call this the Steering Group. Remember that involvement in the group does not have to be onerous, you may only meet 2-3 times.

## **B. PLAN THE PROCESS.**

The Steering Group will then need to make decisions about the size and scope of the evaluation, such as:

- Why you are doing the evaluation,
- What you hope it will achieve,
- Who will be involved,
- Which services or beneficiary groups it will cover,
- How complex you want the evaluation to be,
- How long you will spend on it,
- What budget you may need for it (e.g. travel expenses to meet with beneficiaries, or incentives for beneficiaries who take part)
- When the evaluation will take place. Ideally you will collect information from participants BEFORE they have attended the service or project. You can then compare this with information you collect AFTER they have attended, to see if anything has changed. You may also want to collect data again several months afterwards to see if these changes have become permanent, or have led on to other changes.

You may also have some specific research questions you want to answer through the evaluation, such as:

'Are some of our beneficiaries benefitting more than others from our services (e.g. younger/ older people, men/women?) If so, do we need to change some aspects of our services to help a wider range of people?'

An example could be that an organisation based in another part of the country approaches you. They've heard about your training courses and would like your advice. They have the funding to run a pilot training course with their beneficiaries and wondered if they could run one of your courses in their area.

The organisation belongs to a network of other organisations working in this field, to which you also belong. One of the aims of the network is to share best practice and develop collaborative links with other organisations. You are keen to build links with this other organisation, and can see benefits to your organisation from doing so. You decide that you are happy for one of your courses to be run by them (which will still be branded with your logo).

They have conducted a needs assessment and know that their beneficiaries lack the confidence and motivation to go online by themselves. The organisation has selected two of your courses as being appropriate for their beneficiary group (Course A and Course B). To help them choose between these, they have asked you which is most effective at increasing confidence and motivation to go online.



Therefore, one of the aims of the evaluation is identify which of the two courses is most effective for those outcomes and to share the findings with this organisation. You may also have been asked to evaluate Course C for a funder, or have other activities that you wish to evaluate as part of the process. Think this through carefully before you start. It is often best to keep the scope of the evaluation small to begin with. You can then expand on this in the future once you are confident about the process.

As you go through the evaluation process the Steering Group will need to meet from time to time to review progress and make decisions.

### C. STAKEHOLDER ENGAGEMENT

At this stage, you also need to decide what information you will collect. Firstly, you need to make sure you collect data on both outputs (e.g. number of beneficiaries completing an IT course) and outcomes (e.g. number of beneficiaries whose IT skills improved after completing the course).

One way to help you identify all the key outcomes of your project – whether they were intended or unintended – is to consult your primary stakeholders. This is the process called Stakeholder Engagement.

By involving stakeholders in the measurement process, you will get a first-hand account of what has changed. Some of what you hear from your stakeholders will be familiar to you, and will be consistent with your project objectives. You may also, however, find that there are additional outcomes or that beneficiaries value outcomes in unexpected ways.

For example, the main aim of your project may be to improve IT skills, which will assist with job-seeking. However, your participants may also tell you about other benefits, such as the money they are now saving through online shopping and using facilities like online billing. To capture the full value of your project, it is also important to include these wider outcomes in your evaluation.

Finally, this step is also valuable for identifying how your project can be improved. The informal interviews and focus groups used at this stage often provide rich information about your project. You may learn a lot about what your project does well and what it might be able to do better.

If you have not conducted a Stakeholder Engagement process before, you can use the [Digital Inclusion Evaluation Toolkit Guide to Stakeholder Engagement](#) which takes you through the process. This includes advice on running interviews and focus groups. Stakeholder Engagement usually involves a process of deciding who all your key stakeholders are (i.e. all those who may be affected by your project). You then spend time talking to each of the key groups of stakeholder (such as beneficiaries, family members of beneficiaries, your local authority, staff, volunteers and so on). This is usually done through focus groups and interviews and will provide you will lots of information about the outcomes or changes your project is having.

This may sound complicated but it does not have to be a very lengthy or time-consuming process. Many digital inclusion projects will have similar outcomes, and you may already be very clear about what changes or impact your services are likely to have. In which case this process could serve as a quick 'reality check' to make sure you haven't missed anything.



This process will:

- Give you a detailed understanding of the effects or changes your project is having on all those affected by it
- Tell you what outcomes to collect data on more formally in the rest of the evaluation to true understanding of the full impact of your project.



### **Can you skip this stage?**

Stakeholder Engagement is a vital part of the evaluation process, which helps to ensure that you collect information on the most important aspects of your service. However, there are some situations where you may not need to run a formal Stakeholder Engagement process. It may be that you have gathered this information in the recent past, perhaps as part of a strategy development process. Or you may chat with your key stakeholders all the time and already know very well how your services are affecting them. There may also be instances where you have a very clearly defined research question that does not require an open engagement with stakeholders. In the example above where you were trying to decide if Course A or B were more effective at improving motivation and confidence, the outcomes you need to measure have already been decided upon. If this is the case, you can decide to move straight to developing a Theory of Change. The Steering Group can help to make this decision based on:

- the quality of information you already have on your stakeholders, and
- how much extra value would be gained from a formal stakeholder engagement process

## **D. CREATE A THEORY OF CHANGE**

Once you have completed your stakeholder engagement, you should have a clear idea about how your project creates change. It is helpful to summarise this in a *Theory of Change*.



### **Theory of Change:**

This is a visual representation of how the activities you deliver lead to the outcomes you have identified. It is usually presented in the form of a table or flow chart. A good Theory of Change will give a simple, clear depiction of what your project does and what it achieves by this. It may include inputs (such as the cost of developing a new training course), activities (e.g. training courses, coaching sessions and so on), outputs (e.g. number of people trained), and outcomes (IT skills improved). You may want to show short, medium and long-term outcomes. You may need a separate Theory of Change for each type of beneficiary or stakeholder. This is also sometimes called a log frame, logic model, chain of events or impact map. There are some subtle distinctions between these terms but for the purposes of your evaluation you can assume they achieve the same thing.



An example of a Theory of Change is given below. It shows two key stakeholder groups for a training course aimed at older people (the participants and the State). It also shows short-term outcomes (which occur as a direct result of the course), intermediate outcomes (which occur because of the short-term outcomes) and long-term outcomes, which are the end result.

STAKEHOLDER	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
<b>OLDER PEOPLE</b>	Introductory IT training Social engagement opportunity	Numbers of people trained	<ul style="list-style-type: none"> <li>Improved confidence and motivation to use ICT</li> <li>Improved skills</li> <li>Knowledge/awareness of online services</li> <li>New opportunity for social engagement</li> </ul>	<ul style="list-style-type: none"> <li>Effective access (e.g. regular use of online communication)</li> <li>Increased 'electronic literacy' (e.g. self-teaching)</li> <li>New friendships</li> </ul>	<ul style="list-style-type: none"> <li>Reduced isolation (electronic communication)</li> <li>Reduced isolation (new friendships)</li> <li>Economic savings from access to products and services</li> <li>Improved quality of life (confidence, skills etc)</li> </ul>
<b>THE STATE</b>	Introductory IT training Social engagement opportunity	Numbers of people trained	<ul style="list-style-type: none"> <li>Knowledge/awareness of online services</li> <li>Reduced isolation</li> </ul>	<ul style="list-style-type: none"> <li>Reduced digital exclusion</li> <li>Reduced demand for institutional care</li> </ul>	<ul style="list-style-type: none"> <li>Cost savings from use of e-services</li> <li>Older people can live in their homes for longer</li> </ul>

### E.SET INDICATORS

To prepare for data collection, we have one more task. We need to identify an *indicator* for each outcome area.

Developing indicators can be challenging, especially if you are new to evaluation. To save you time and effort, and to encourage a consistent approach, we have created the [Digital Inclusion Evaluation Toolkit Bank of Outputs, Outcomes and Indicators](#). This

includes indicators for most outcomes that are likely to result from digital inclusion projects. It includes everything from direct outcomes – for example, improvements in IT skills – through to wider outcomes, such as those around confidence, well-being, and employability.

Use your notes from stakeholder engagement to select the relevant outcome areas and indicators. Use this to fill in the table below for all key stakeholders. Should you have any additional outcome areas that are not covered, you can construct your own indicators for these. If you need further help with this there are resources online that you can use. Try searching for examples of indicators for whatever concept you want to measure to see how it has been measured by others. For example, see guidance from the UK Data Service.

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**Indicator:**  
A variable that will tell you whether an outcome has occurred. For example, the outcome 'increased confidence' could be measured by the indicator 'self-reported level of confidence'



STAKEHOLDER	OUTCOME	INDICATOR
e.g. Participant	Increased IT skills	Percentage reporting they are able to carry out specified tasks online
e.g. Participant	Increased confidence	Proportion of participants reporting an improvement in their confidence levels before starting and finishing the course
...		

You can now fill in the early sections of your evaluation report. It will save time later if you write this as you go along. You can use the [Digital Inclusion Evaluation Toolkit Report Template](#) to help you.

✔ **STAGE 1 CHECKLIST**

*Have you....*

- Selected a Steering Group to oversee the evaluation?
- Clearly defined the aim, activities and timescales and research questions for your evaluation?
- Identified your key stakeholders?
- Talked to your stakeholders to understand their views?
- Identified key outcome areas and corresponding indicators?
- Developed a theory of change?
- Started writing your evaluation report?

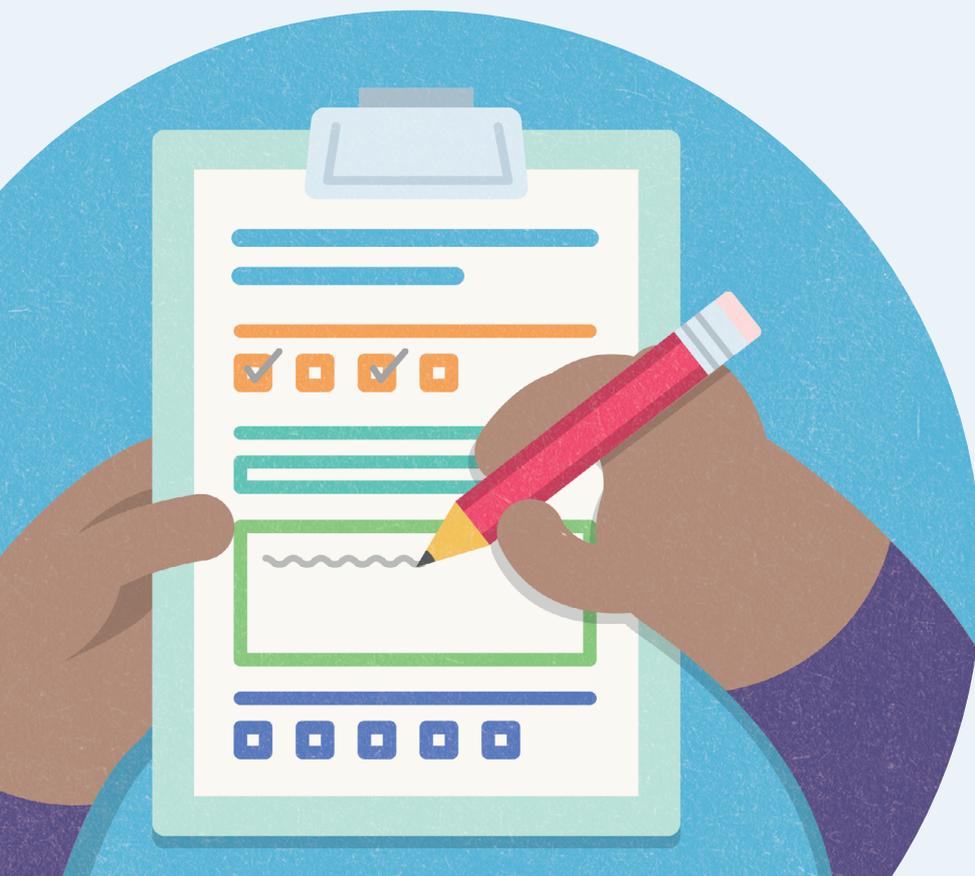
## STAGE 2:

# COLLECT THE DATA

You will, by now, have developed a rich description of the main ways in which your project creates change. In this stage, you will begin to collect the evidence to put numbers besides these changes.

There are many ways to collect data. We will introduce you to the most common method in evaluation – the survey. This stage will cover:

- A. DESIGNING YOUR SURVEY**
- B. GETTING THE RIGHT SAMPLE**
- C. MEASURING DEGREE OF CHANGE**
- D. CONFIDENTIALITY AND ETHICS**



## STAGE 2:

# COLLECT THE DATA



### A. DESIGNING YOUR SURVEY

Don't worry if this is the first time you have carried out a survey. We have created the [Digital Inclusion Evaluation Toolkit Survey Template](#) to help you. You will also find a set of survey questions in the [Digital Inclusion Evaluation Toolkit Bank of Indicators, Outcomes and Survey Questions](#). Adapt this to your project using the rules below:

- Keep it as short as you can, preferably so that it takes no longer than 10-15 minutes to complete. A long survey will put people off.
- Set it out in a clear, logical order with enough space between each question.
- Begin with a short introduction explaining the purpose of the survey, who is conducting the research, confidentiality, consent and contact details in case the respondent has any questions. Also mention any follow up survey they will be asked to also complete.
- Be clear about why you are asking each question. Only include things you really need to know.
- Include questions that measure all the indicators you identified in Stage 1
- Make it accessible. Keep the wording simple and don't make the page too text-heavy. Make sure the font is large enough for anyone with visual impairments. Don't assume any prior knowledge or understanding. Explain any jargon terms clearly.
- Online surveys can help make a survey visually appealing. Even if your participants will not have the skills to complete them online, they can still be printed off and circulated. Once completed you can input the data online to aid your analysis. They are also quick and easy to run, and can help ensure your survey can be completed anonymously. There are basic free versions available online such as through Google Forms. Survey Monkey is another useful online survey tool. Even if you decide not to use these you could view them for ideas for survey design.

If you are creating new questions, make sure that each one:

- Is easy to read using simple words and concepts
- Is neutral and does not make assumptions or lead the respondent to a particular answer (e.g. use 'was the training useful or not useful' rather than 'was the training useful?')
- Avoids double-negatives
- Follows a standard response scale (e.g. 5-points; 7-points).
- Includes 'does not apply/don't know' as a response option
- Has response options that are mutually exclusive (e.g. use 1-3, 4-6, 7-10 not 1-3, 3-6, 6-10. If someone selects '3' or '6' they can allocate their response to only one option)
- Minimises text boxes, which can be difficult to analyse



You may need to develop separate surveys for different beneficiaries e.g. older people may have a different set of questions to people with disabilities.

When you have a draft of your survey ready, it is always a good idea to try it out on colleagues, friends, or a handful of participants. This process of testing is called *piloting*. It will help you to identify any questions or instructions that may be unclear, giving you the opportunity to correct the survey before you give it to your full sample.

For further advice on designing surveys see also a separate guide: Survey Technical Guidance: Samples Design and Analysis.

## B. GETTING THE RIGHT SAMPLE

One of the key aspects of running a successful survey is who responds to it. In many cases, you will ask all the project participants to complete the survey. The higher the proportion that complete the survey – this number is known as the *response rate* – the more accurate your findings will be.

For example, 200 people complete Course A over a three-month period. It may be that 160 of those go on to use the internet independently, ultimately achieving several key long-term outcomes for your project. 160 people out of a total of 200 in total is 80%, which is a relatively high success rate.

But your survey may only be completed by 40 people. If so, it is possible (though unlikely) that these all fall within the group of 40 people who did not go on to use the internet independently. In this scenario, the results of the evaluation would not indicate the true success of the training course. Rather than demonstrating an 80% success rate, it would suggest that none of the participants go on to use the internet independently. To avoid this, you need to get as many people as possible to complete the survey. This will give the most accurate picture possible. On the other hand, accessing all 200 participants may be difficult so it is necessary to identify an appropriate sample size.

There are no hard and fast rules about sample size, unless you are planning to use formal statistical tests in your data analysis (see below).

For projects or services which have a population of less than 100 participants, aim to include all your beneficiaries in your evaluation. This will make sure you have a diverse range of opinions and feedback and help ensure the results are accurate. Of course, it is difficult to get everyone to complete a survey, but you should aim for this if you have a small number of beneficiaries. This is because you need to ensure you have a *representative sample*.

For larger scale projects (with total participants numbering between 100 and 1000), try to aim for a minimum sample size of 100.



**Piloting:** The process of testing a survey out on a few people initially to check that it works properly, and making changes to it if needed.

**Response rate:** Proportion of the total population that respond to a survey. For example, if 200 people completed a course, of which 40 also completed a survey, the response rate would be 20%. This is related to sample size, which is the total number of people to have taken part.



**Representative sample:** Your project may be more successful with some people than others, depending on their age, gender or another factor. So, you need to make sure that the group of people who complete your survey is reflective of the whole group of people who use your services. This is known as a representative sample.

The only way to make sure your sample is completely representative is to make sure everyone fills in the survey. This is especially important for small groups of beneficiaries (less than 100) because missing out just a few people could bias the results.

You can check how representative your sample is by identifying what factors might influence the results, such as age, gender, previous skills-training, medical condition and so on. You can then ask participants to report on this (anonymously if appropriate). If you gather this information about all your beneficiaries when they use your service, you can compare the proportions of each within your sample against your total population. For example, you know that 10% of your beneficiaries are registered blind. If 10% of those who completed the survey are also registered blind you know that the sample is representative of this factor, which could have an influence on the results. These factors are usually called 'demographics' and it is useful to report on them in your evaluation.

For very large projects (with total participants numbering over 1000), aim for a sample size of around 10% of the total population. For example, for a population of 6000 people a reasonable sample size would be 600. Although this captures only 10% of the total population, 600 different people should provide a wide range of responses, broadly representative of the total population. Of course, if you have the time and resources to capture more than this then you should do so. A higher sample size is always preferable as it reduces the likelihood of a bias in your responses, as happened in the example above.

Another factor to be aware of is that sometimes only those who have had a very positive or very negative experience fill in the survey. This is known as a **response bias** and again it will skew the results. Try to think of ways of motivating everyone to complete the survey. Telling them how important the results are to you can help, for example in demonstrating your success to funders.



**Response bias** happens when the results of a survey are not accurate, and instead are skewed, or biased, towards a particular finding. This can be caused by 'leading questions' that influence people to be more (or less) negative than they really are. Or it can be caused by not having a representative sample (e.g. people who have had a negative experience avoid completing a survey because they don't feel comfortable reporting this).

You could also tell them that their feedback is vital to help you continually improve your services. You may even want to offer an incentive such as gift voucher or free course (randomly selected from all responses). It is also important to let them know that they can say anything – good or bad – in their responses. If people do not feel comfortable giving critical feedback you won't know how to improve your services or make them as effective as they could possibly be.



You could also consider whether there is a particular time when they are more likely to fill in the survey. This might be at the start or end of a specific course session. If you are asking them to complete it at the end of a training course, build time into the course schedule for this and make sure the course runs on time. It is difficult to get people to complete a survey if they are running late to get home at the end of a day. If you are using an online survey bear in mind that the response rate is likely to be higher if you ask people to complete the survey within the session. If you send a link following the course for them to do at home the response rate tends to be much lower.

If you find that a group of beneficiaries are under-represented you can always boost your sample with them at a later stage.

A final word on sample sizes: If you are conducting a complex, advanced-level evaluation you may wish to run statistical analysis on your results. This could tell you, for example, if there is a statistically significant increase in use of the internet by those attending your course. You could do such a test with your own sample e.g. to statistically compare outcomes between two different courses or sets of beneficiaries, or you may want to compare it to some kind of control group e.g. a matched group of people with the same characteristics of age, gender and so on who did not attend the course. If you are conducting this sort of evaluation you will need to check what sample size you need in order to run the appropriate statistical analyses for this. You can get help with this online. For example, there are excellent resources on YouTube that will provide step-by-step support through a particular statistical test. However, if you are new to evaluation, you may want to get more formal training in quantitative research. You should be able to access these through your local community college. There are also many online courses some of which are free of charge.



**Statistical significance:** This is a mathematical tool which will tell you whether any differences you see between two groups are just due to chance, or whether they are due to genuine differences between the groups. For example, you might find evidence that people who completed a full day training course used the internet more often afterwards than those who attended a one-hour training course. It is possible that this difference is quite small, in which case you might encourage people to attend the shorter course to save time and resources. Or it may be that the difference is statistically significant, which indicates that you should encourage people to attend the longer course as you know it will benefit them to do so. If you decide to run statistical tests on your results you should refer to guidance on the minimum sample size needed to run the test accurately.

### C. MEASURING DEGREE OF CHANGE

To show how something has changed you need to have measured at multiple points in time – usually a starting point, or what is known as a baseline measure, and an endpoint. For example, to determine if a training course increases IT skills, you will want to assess the participant's skills at the start of the course and at the end. The difference in skill level will indicate the degree to which this outcome has been achieved.



Surveying only at the end of a project is one of the most common mistakes in evaluations. Plan from the outset to take a *baseline measure* when you first engage participants –whether that is at the start of a course, or when you first come into contact with them.



**Baseline measure:** A measurement (such as level of IT skills) that is taken before an intervention has taken place.

For example, you may want to know if a training course has increased the confidence of your beneficiaries to go online. However, perhaps they were already quite confident, and the course helped only a little. Or perhaps they were very unconfident before the course, and the course has completely transformed the way they feel. It would be useful to know which of these is the case.

We strongly recommend that you run your survey a minimum of three times: at baseline, at the end of the course and at some period following course completion (e.g. 3-6 months). Sometimes it isn't possible to stay in touch with people beyond the life of the course. However, this longitudinal data is the only way we know if outcomes last into the future. This is very important with something like internet use where initial enthusiasm can fall away if use does not become established. It is usually acceptable to have smaller longitudinal samples. Consider asking people for contact details at the end of the course to enable you to stay in touch. It is common to use the telephone to conduct such surveys and some organisations successfully use social media to stay in touch with participants.

You will probably need to adjust some of the questions in your survey to run it as a follow-up. Keep these tweaks to a minimum. You want the two surveys (baseline and follow up) to be as similar as possible so you can compare the results. We have given some examples of this in the [Digital Inclusion Evaluation Toolkit Survey Template](#).

There are two other factors to bear in mind when creating the follow up survey:

- **Identifying individual respondents:** you need to compare Person A's baseline survey responses with Person A's follow up survey responses. If you want people to respond anonymously to your survey (e.g. to avoid a response bias), you will need to allocate a reference number or code to each person. You then store this reference number with their survey results, not their name. In a separate place, you will need to store the list of reference codes and corresponding names. To ensure confidentiality, the person analysing the results should not have access to this file.
- **Attribution:** it is likely that there are other factors influencing your beneficiaries as well as the service you are evaluating. For example, they may be attending another service or have extra support at home from a family member. To assess this, you need ask a question in your follow up survey along these lines:



**What proportion of the change you have reported do you feel has happened because of [service being evaluated]?**

None      Some      About half      Most      All



In Step 3 we will show you how to take account of the findings from this question when you analyse your results.

#### D. CONFIDENTIALITY AND ETHICS

It is vital that you consider the ethics of your evaluation. You may be collecting sensitive information from vulnerable people. This is something the Steering Group should discuss and agree upon. Ethical concerns could apply to the stakeholder engagement activities as well as the survey.

It may not be appropriate to collect data from certain people, or in certain circumstances, for example, if there is a possibility that doing so could cause distress. It may be more appropriate to ask a carer, family member or friend to complete a survey on someone's behalf. Or you may decide to exclude certain people from your evaluation on ethical grounds.

It is completely legitimate to ask questions on sensitive topics such as confidence and loneliness in your survey. However, if you are asking questions about sensitive subjects, think carefully about whether you really need to gather that information. If you decide you do need to collect it, think about the best way of doing so. Sometimes it may be more appropriate to carry out the survey face-to-face, especially for very sensitive information. It is important that the wording of the questions in the survey is the same for all respondents. However, you can alter the way you introduce the question or discuss their response to it. Also, think about offering (or signposting to) support to help people deal with any sensitive issues covered in the survey. Your pilot should be a way to pick up any issues with how questions are phrased. If you are concerned about the ethics of your research you can refer to [guidelines](#) such as those published by the Social Research Association. The UK Evaluation Society has also produced [guidelines for good practice in evaluation](#).

Enabling people to respond anonymously can encourage people to complete the survey honestly. Online surveys can help with this. Make sure the questions don't request information that can identify individual participants.

Store the survey data securely. If you are using an online survey, store the username and password securely. Paper surveys should also be stored securely and destroyed once a project is complete. (Although check first that originals are not needed for auditing purposes from funders).

Include a consent statement on your survey as well as your contact details in case participants have any queries. (See our survey template for an example of how you might word this). Let the participants know that completing the survey is optional and that they are free to withdraw if they wish, without giving a reason. Also make it clear what will happen to the data you are collecting (e.g. how it will be used and shared).



## ✓ STAGE 2 CHECKLIST

### *Have you....*

- Designed a survey and piloted it?
- Considered ethics and confidentiality?
- Run the survey with an appropriate number and type of respondent?
- Run the survey at least twice, before and after your intervention?
- Completed the data collection section of your evaluation report?

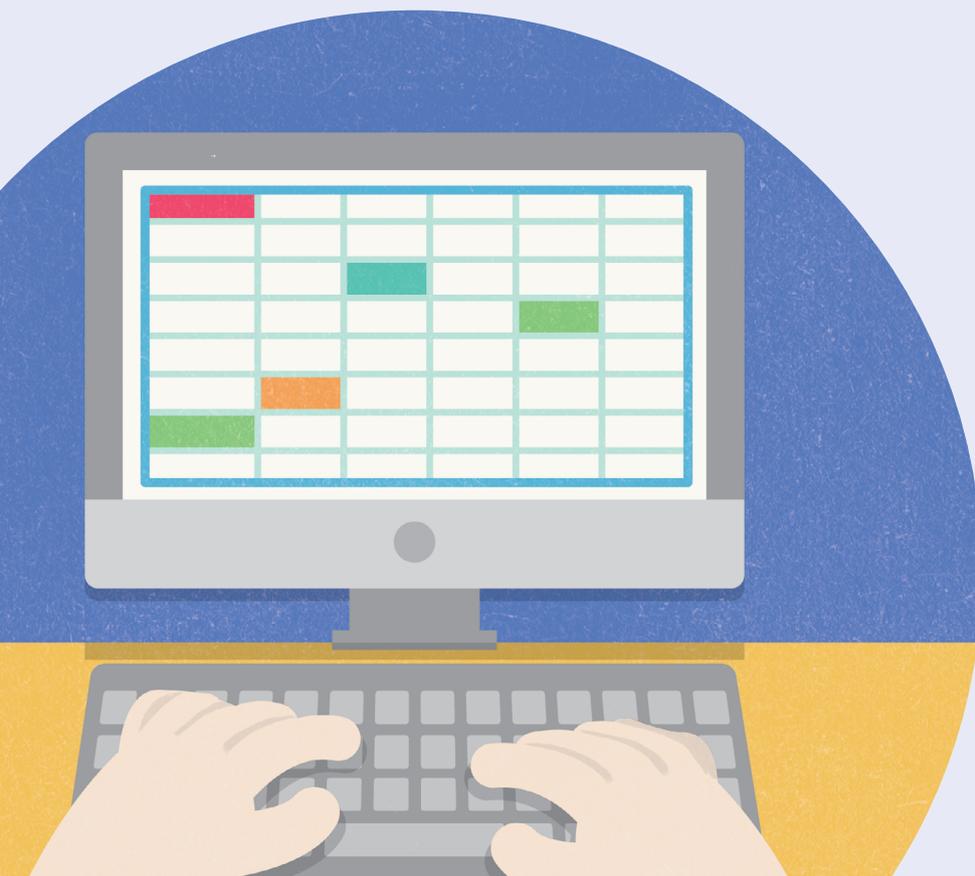
## STAGE 3:

# ANALYSE THE DATA

In this section, we will show you how to interpret the results of your survey. By the end of this section you will have a set of summary statistics which give an overview of your project.

To do this we will:

- A. CONVERT ALL RESPONSES ON THE SURVEY TO NUMERICAL VALUES**
- B. UNDERSTAND THE DEGREE OF CHANGE SEEN**
- C. UNDERSTAND HOW MANY PARTICIPANTS EXPERIENCED THESE CHANGES**
- D. UNDERSTAND HOW MUCH OF THIS CHANGE WAS CAUSED BY YOUR PROJECT**
- E. DRAW ALL YOUR FINDINGS TOGETHER**



## STAGE 3:

# ANALYSE THE DATA



Before you begin to analyse the data, you will need to collect it in one place. One of the best ways of doing this is to create an Excel spreadsheet to store and analyse the data.

If you have used an online survey the data entry will already have been done for you – you can simply export the data to Excel for analysis. Even if you have used a paper survey you could enter the responses into an online survey tool (such as Survey Monkey or Google Forms) and use it to automatically generate your Excel spreadsheet.

### A. CONVERT ALL RESPONSES ON THE SURVEY TO NUMERICAL VALUES

First, though, you will need to convert the responses to your survey questions to numerical scores. For many survey questions the responses will already have a numerical score (e.g. rating confidence on a scale of 1 to 5). For others, you will need to convert qualitative responses into numbers, such as:

?				
<b>Question 3: How often do you go online?</b>				
[Never]	[Rarely]	[Sometimes]	[Often]	[Always]

To turn this into a numerical scale, you need to give each response a numerical value – for example, '0' to all the 'Never' responses, '1' to all the 'Rarely' responses, '2' to all the 'Sometimes' responses and so on.

Once you have done this for all your responses, you can calculate the average response. To do this, add up the responses and divide by the number of participants.

Here is a worked example for the scale question with five respondents:

RESPONDENT (REFERENCE NUMBER)	RESPONSE	CODE
A1	Rarely	1
A2	Rarely	1
A3	Never	0
A4	Always	4
A5	Rarely	1
<b>Total</b>		<b>7</b>
<b>Average (=total/number of respondents)</b>		<b>1.4</b>



## B. UNDERSTAND THE DEGREE OF CHANGE

It is useful to know that your course has increased the confidence of your beneficiaries to go online. However, perhaps they were already quite confident, and the course helped only a little. Or perhaps they were very unconfident before the course, and the course has completely transformed the way they feel. It would be useful to know which of these is the case.

To do this you will need to have collected data at two (or more) points in time (preferably before and after the course). The degree of change will be the difference in their confidence rating between the two times, as shown below.

The example below refers back to the two courses (Course A and Course B) mentioned at the beginning of this guide, which your partner organisation asked you to evaluate.

The participants were asked to score their level of confidence to go online on a scale of 1 to 5 (with 1 being very unconfident and 5 being very confident).

### *Confidence scores for Course A*

RESPONDENT	BEFORE COURSE A	AFTER COURSE A	DIFFERENCE
A1	1	3	2
A2	2	4	2
A3	1	4	3
A4	2	4	2
A5	3	4	1
<b>Average</b>	<b>1.8</b>	<b>3.8</b>	<b>2</b>

You can see from the above that respondent A3 showed the biggest transformation, from a score of 1 to a score of 4 (an increase of 3 scale points). Respondent A5 showed the least change, with an increase of one scale point. Overall, the average increase in confidence was 2 scale points for Course A.

You do the same analysis and find that on Course B, the average increase in confidence was 2.4 scale points. You notice that for three of the respondents the degree of change was particularly high (4 scale points).

### *Confidence scores for Course B*

RESPONDENT	BEFORE COURSE B	AFTER COURSE B	DIFFERENCE
B1	1	5	4
B2	1	5	4
B3	1	5	4
B4	2	2	0
B5	3	3	0
<b>Average</b>	<b>2</b>	<b>4.4</b>	<b>2.4</b>



So you have found that, on average, both Courses A and B increase the participant's confidence to go online. The average increase in confidence is slightly higher for Course B (2.4 scale points) than for Course A (2 scale points). However, you have also noticed that the effects were not the same for every respondent.

You may be including a follow up evaluation several months after the courses have taken place to see if the changes seen continue over time or lead to further changes. If so, you would include a further column for 'After three months' or whatever was relevant. You could then compare your baseline level of confidence to the level of confidence both directly after the course and after three months (or whatever time period you are using).

### **C. UNDERSTAND HOW MANY PEOPLE EXPERIENCED THESE CHANGES**

You have noticed that Course B did not alter the confidence level for all participants. The scores for respondents B4 and B5 did not change between baseline and follow up, suggesting that the course did not increase their level of confidence. By contrast, all participants in Course A showed an increase in confidence following the course.

In the above example, 100% of respondents showed an increase in confidence after attending Course A, and 67% showed an increase in confidence after attending Course B.

It is useful to know whether the outcomes have been achieved for all course participants or just some, as this will give you a more detailed understanding of the effectiveness of the course. If some people do not appear to be benefitting from the course, but others do, you may want to investigate this further to understand why. You may find that the course is more suited to certain people (perhaps based on age, health condition or some other factor). Knowing this will help you to adapt the course that it is effective for everyone.

Further investigation might show you that, participants B1, B2, and B3 were aged 30-40, and respondents B4 and B5 were aged 70-80. This would suggest that the course is effective at increasing confidence in participants aged 30-40, but not for older participants. However, the sample size is too small here to draw any strong conclusions. You would need to investigate this further with a larger sample size to see if it was a consistent finding. If so, you may need to develop courses for different age groups or adapt the course so that it has a broader reach.

As we can see a simple comparison of the average change for the two courses may mask this. You need to spend some time looking at your results to ensure you have fully understood them. If you find unusual or unexplained results you may want to get some help with the analysis from someone with more experience of data analysis (such as a volunteer or trustee with this expertise). This may be a point where you could approach a local university for help from a social science Masters student.

### **D. UNDERSTAND HOW MUCH OF THIS CHANGE WAS CAUSED BY YOUR PROJECT**

Another reason for a difference in the effectiveness of the course between different participants could be identified through analysis of attribution. This helps you to take account of factors other than the course that may have brought about the change, such as family member providing additional support after the course.



You may have used a question such as the following in your survey when conducting the follow up data collection:

?

***How much of the changes you reported above do you feel are due to the [training course] you attended?***

None      Some      About half      Most      All

You will need to convert the responses into numerical values as follows:

RESPONSE	NONE	SOME	ABOUT HALF	MOST	ALL
Assigned value	0	25%	50%	75%	100%

Taking account of other factors which may influence the results is an important part of evaluation, and it will help you to understand your results. In the above example, it may be that the three participants in Course B who showed the greatest increase in confidence may all have also accessed other support as well as the course, which could explain the results. Knowing this may help you develop or refine your services appropriately.

## **E. DRAW ALL YOUR FINDINGS TOGETHER**

You should now be able to report on the following for each stakeholder group you have included in your evaluation:

- (a)** Key Inputs: e.g. total cost to the organisation of running a course, total staff or volunteer time needed to run the course and so on.
- (b)** Key outputs e.g. number and type of courses delivered over a set time (annually, monthly)
- (c)** Key outcomes, including average numbers of participants achieving outcomes, degree of change seen, and level of change attributable to the project.

### ***Measuring the total number of outcomes attributable to the project***

You may choose to take your data analysis one stage further and calculate 'the number of outcomes attributable to the project'. This draws together all the key findings into a single measure. This enables more direct comparisons between services. The following example shows you how to do this.

Firstly, you will need to decide on a numerical value for a 'full outcome'. This is the greatest possible change that could be shown on your measure. In our example of Courses A and B, we measured the confidence level for IT skills on a scale of 0 to 5. The greatest change possible would be 5 scale points. This would be a 'full outcome' i.e. it would show a transformative effect from having zero confidence in IT skills to have full confidence in them.



You can then calculate the number of full outcomes achieved by dividing the average change seen by the total possible amount of change.

	(A) AVERAGE DIFFERENCE IN CONFIDENCE LEVEL	(B) FULL OUTCOME VALUE	(C) NUMBER OF FULL OUTCOMES ACHIEVED (A DIVIDED BY B)
Course A	2	5	0.4
Course B	2.4	5	0.48

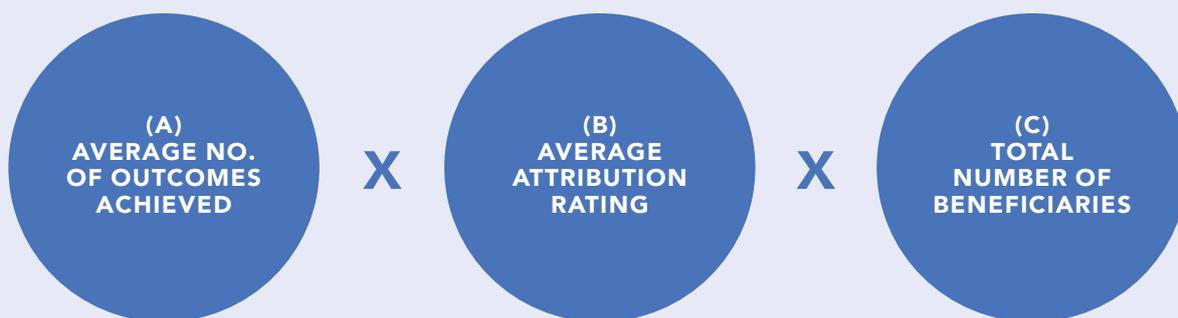
This will enable you to compare between different outcomes (e.g. if they are measured on different scales). On this measure a score of 0 indicates no change in confidence level, and 1 indicates the maximum possible change in confidence level had taken place.

In the above example, both courses score near to 0.5, which indicates on average that around half the maximum degree of change took place. [I.e. this puts the 'two-scale point' change in the context of the maximum possible scale point change].

If you were comparing this with another service where confidence level had been rated on an 8-point scale, say, you could now compare the results more easily. (I.e. a two-scale point change on a five-point scale is more significant than a two-point change on an eight-point scale).

Next you need to take account of the proportion of participants experiencing a change, the total number of beneficiaries and the attribution rating.

To calculate our final measure 'total number of outcomes attributable to the project' you do the following calculation:



Let's include some attribution rating scores for both courses, along with the other scores previously discussed.

	NUMBER OF FULL OUTCOMES ACHIEVED	AVERAGE ATTRIBUTION RATING	TOTAL NUMBER OF BENEFICIARIES*	TOTAL OUTCOMES ATTRIBUTABLE TO PROJECT
Course A	0.4	(0.8) 80%	60	19.2
Course B	0.48	(0.5) 50%	60	14.4



This final calculation allows us compare directly between Course A and Course B.

Overall, the findings suggest that Course A is more successful at increasing confidence levels than Course B, although the difference is not very large.

## STAGE 4:

# USE THE DATA

You should now have a rich and detailed picture of the quality and effectiveness of your project. You will know what the outcomes have been, to what extent they have been achieved, and with whom.

The next stage is to use this to 'prove and improve' your project's success by doing the following:

- A. DECIDE ON ANY CHANGES TO YOUR PROJECT**
- B. COMPLETE YOUR EVALUATION REPORT**
- C. SHARE THE FINDINGS**



# STAGE 4: USE THE DATA



## A. DECIDE ON ANY CHANGES TO YOUR PROJECT

This is perhaps the most important step of the whole process. You can now refine and develop your services to make them even more effective. You may have discovered that not all your stakeholders are benefiting equally from your services. Or you may have been surprised at some unexpected outcomes or perhaps some negative impacts that you weren't aware of. All of this is incredibly useful to know, as it tells you how and where to make changes that will improve your project.

Or you may have found that an activity or service is more successful than you had realised and is transforming lives in ways that you weren't aware of. You can use this finding to expand or develop this service so that it reaches even more people.

The Steering Group should agree on the recommendations. You might also want to plan another evaluation to see how successful these changes have been. The Steering Group might agree to meet again at regular points in the future to monitor these changes and plan the next evaluation cycle.

## B. COMPLETE YOUR EVALUATION REPORT

You will also want to share the positive findings with others, to celebrate your success. To do so you will need to complete your evaluation report. If you have not already done so, you can use the [Digital Inclusion Evaluation Toolkit Report Template](#) to help you with this. The template draws on best practice guidance for evaluation reporting.

The key principle is transparency. The report should be clear and open about all aspects of the evaluation. This allows the reader to understand and interpret your results. It also inspires confidence that the process has been robust and the results are accurate.

Include the following areas in your report:

### 1. Background to the project

(general introduction to the organisation and services being evaluated)

### 2. Evaluation aims and scope (including any specific research questions)

### 3. Details of the stakeholder engagement process (or how this information was gathered if you did not go through a stakeholder engagement process as part of the evaluation)

### 4. Stakeholder engagement findings

### 5. Description of key outcomes and indicators (including Theory of Change)

### 6. Details of your data collection process (when and how the survey was run, with whom, any ethical considerations and so on)



## 7. Description of findings

## 8. Recommendations for improving the project

## 9. Recommendations for improving the evaluation process in the future

You may also want to include an Executive Summary at the beginning to summarise the key messages.

### C. SHARE THE FINDINGS

You can now use the evaluation report to share the evaluation findings with other. This could include:

- Circulating the evaluation report or a short summary to your funders and other key stakeholders
- Putting the key findings on your website or blog
- Holding an event to launch the findings or thank everyone who participated

#### STAGE 4 CHECKLIST

##### *Have you....*

- Agreed on any changes you will make based on the evaluation findings?
- Agreed how to review progress on these changes?
- Completed your evaluation report?
- Shared the findings?

# GLOSSARY

**Baseline measure:** A measurement (such as level of confidence) that is taken before an intervention has taken place.

**Beneficiary:** The people who use your services. You may use another term such as clients, participants, or service users.

**Indicator:** A variable that will tell you whether an outcome has occurred. For example, the outcome 'increased confidence' could be measured by the indicator 'self-reported level of confidence'

**Outcomes:** The changes that occur for beneficiaries as a result of an activity. Outcomes for participants on an internet training course, for example, could include increased confidence, or improved IT skills.

**Outputs:** are the easily measurable, direct results of activities – such as the number of people that attended an internet training course. They usually only tell you that an activity has taken place, rather than what happened as a result.

**Piloting:** The process of testing a survey out on a few people initially to check that it works properly, and making changes to it if needed.

**Representative sample:** A small quantity (e.g. of beneficiaries) which reflect the wider group of beneficiaries in all relevant aspects (for example age, gender and so on)

**Response rate:** Proportion of the total population that respond to a survey.

**Stakeholders:** All those who are involved in, or affected by, your project, such as beneficiaries, staff, volunteers, and so on.

**Stakeholder engagement:** The process of identifying all key stakeholders for your project, and then involving them in your evaluation from the outset by asking for their feedback and insights.

**Statistical significance:** This is a mathematical tool which will tell you whether any differences you see between two groups are just due to chance, or whether they are due to genuine differences between the groups

**Theory of Change:** This is a visual representation of how the activities you deliver lead to the outcomes you have identified. It is usually presented in the form of a table or flow chart

# APPENDIX 1:

# ADDITIONAL SUPPORT

## HELP WITH EXCEL AND/OR STATISTICS

If you want to improve your statistical knowledge, you may consider going on a short course. You should be able to access these through a local community college. If you don't have the time or money, or just want to brush up on what you already know, there are many online resources that you can use. The following websites may be helpful:

<http://www.davidmlane.com/hyperstat/index.html>

<http://www.stats.gla.ac.uk/steps/glossary>

<http://www.stat.berkeley.edu/~stark/SticiGui/Text/gloss.htm>

[You can also access free or paid for courses online. Free statistics courses include:](#)

<https://www.udacity.com/course/st095>

<http://alison.com/courses/Diploma-in-Statistics>

For free Excel tutorials see:

<http://www.skilledup.com/articles/free-excel-tutorials/>

You can get help with small tasks, such as how to use commands in Excel by typing your problem into Youtube. There you will find short videos taking you through an example.

Finally, there are a number of books on statistics that may be helpful. Your library will stock introductory books on statistics, which may be a good place to start.

## WRITING UP YOUR RESEARCH

It is important that you plan and design your project well and this guide is designed to take the hassle out of doing so. If you need further help in research design or writing there are also resources online that might be of use. Although aimed at academic writing, the following site gives a comprehensive overview of different aspects of a research report, which may be helpful:

<http://libguides.usc.edu/c.php?g=235034&p=1559821>

## EVALUATION SPECIFIC RESOURCES

There are lots of places you can go for evaluation-specific training and support. The Charities Evaluation Service (<http://www.ces-vol.org.uk/tools-and-resources>) and NCVO are good places to start (<https://www.ncvo.org.uk/practical-support/publications/print-publications?start=20>).

You may also find the Proving and Improving website (<http://www.proveandimprove.org/index.php>) helpful for general guidance on measurement. It also contains an overview of different approaches to measuring impact and assessing quality.

If you would like further help with identifying stakeholders and developing theories of change, the SROI Network have a number of resources as well as a Guide to Social Return on Investment (SROI). They also run training for anyone who would like to take their new skills further and their site contains lots of case studies of SROI evaluations. The SROI guide is available for download here:

<http://www.thesroinetwork.org/sroi-analysis/the-sroi-guide>

## **ETHICS**

If you have queries about ethical issues in your research, you can find out more information about ethics in social research on the British Sociological Association website:

<http://www.britsoc.co.uk/media/27107/StatementofEthicalPractice.pdf?1427730795726>

## **QUESTIONNAIRES**

The UK Data Service <http://ukdataservice.ac.uk/> contains data from large surveys funded by the government such as the Health Survey for England, The British Crime Survey and the British Social Attitudes Survey. You can access the full surveys, search for individual survey questions or access raw data. Survey Question Bank

<http://surveynet.ac.uk/sqb/> is run by the UK Data Service. Use the 'Find Questions' or 'Search Questionnaires' links on the homepage to search for questionnaires and questions relating to your chosen theme. For example, if we type 'internet' into the search box under search questions, we see questions from the British Social Attitudes Survey and the Home Office Citizenship Survey on internet access at home and at work. You can also access specific topics by following this link:

<http://surveynet.ac.uk/sqb/topics/introduction.asp>

[Some further resources on developing and administering surveys are available here:](#)

<http://library.bcu.ac.uk/learner/writingguides/1.05.htm>

[http://www.survey.bris.ac.uk/support/wp-content/uploads/2011/02/question\\_design.pdf](http://www.survey.bris.ac.uk/support/wp-content/uploads/2011/02/question_design.pdf)

## **ONLINE RESEARCH**

The internet contains a large amount of published research from the social sciences that may be of use to you when carrying out your research project. For example, if you are interested in supporting people into employment, you may want to read about other research that uses ICTs to support people into work. There are two ways to access information of this kind. First, public and not-for-profit agencies regularly produce research reports on such topics. So called 'grey literature' can be accessed through web searches on your theme. Make sure you vary your search terms and look at bibliographies of relevant papers to get citations of other useful research. Second, you can use Google Scholar to access publications from academic journals. Some of these will only be available through subscriptions in research journals. However, if there is a publication that is very relevant to your work, try contacting the academic that wrote it to request a copy. Again, make sure you vary your search terms in Google Scholar and click on the cited by link to see what other research has cited the papers that are of most interest to you.

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Cabinet Office

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