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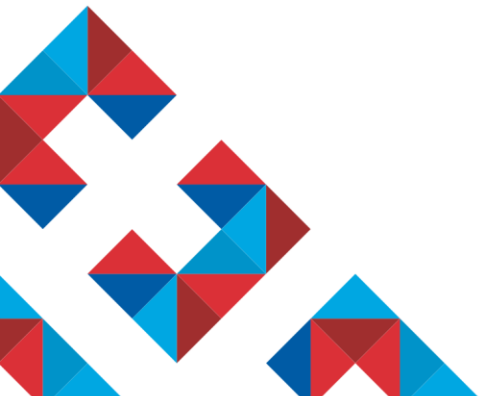
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

Impact+ Exercise

Workshop Guide

Version 1.1 (2018)



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Erasmus+ is the European Union programme for education, training, youth and sport.
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CMEPIUS
Centre of the Republic of Slovenia for Mobility and European Educational and Training Programmes

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Introduction

This guide explains how to run the **Impact+ Exercise** workshop.

It includes:

- An overview of the **Impact+ Exercise** tools and how to use them.
- Guidance and prompts for the facilitator to help the discussions; and
- Suggestions for running the workshop.

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Purpose of the Impact+ Exercise

The **Impact+ Exercise** is intended to help projects think about what their impact will be, how they will measure it and how they will collect data to evidence it. As well as being essential in order to work out if your project has been successful or not, measuring impact is often required by funders.

It aims to act as a starting point for discussions about impact which will lead to the outline of an impact assessment plan.

Impact assessment and evaluation takes time and effort to be effective. After the **Impact+ Exercise** you will still need to review and refine your impact plans and to design and implement your data collection methods.

> *"Try not to over think things during the **Impact+ Exercise**. The aim is to get you thinking about impact. Focus on getting your ideas down on paper first – you can review and revise them later."*

The **Impact+ Exercise** is not intended to result in a fully-functioning impact assessment plan or to generate data collection tools.

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The Impact+ Exercise

Overview

The **Impact+ Exercise** is split into four stages:

- Stage 1 – exploring project aims, identifying outcomes and impacts.
- Stage 2 – exploring indicators for your outcomes and impacts.
- Stage 3 – exploring data sources and data collection.
- Stage 4 – bringing it all together.

How should the Impact+ Exercise be used?

The **Impact+ Exercise** is intended to be used early on during project planning by a group of project partners.

However, the **Impact+ Exercise** is flexible and can be used in different ways. For example:

- Before submitting an application to help you to refine and complete your project idea.
- At the start of your project to help you identify your intended impact and to plan your impact assessment activities.
- During your project - to track progress against intended impacts or to reassess impacts.
- At the end of your project - to support a summative impact assessment.
- By a single partner who could present a 'finished' exercise for discussion with partners.
- By all partners independently who then come together to discuss their exercises and agree a 'finished' version for the project overall.

It may suit you and your partners to use it differently – change and adapt it to suit your needs.

What materials do you need?

The materials needed are readily available so anyone can organise an **Impact+ Exercise** workshop.

For each discussion group in your workshop you will need:

- A copy of the guidance **Impact+ Tool** (A3) – ideally one per participant.
- A copy of the blank **Impact+ Tool** (A3).
- A flipchart (optional), flipchart paper & a pen.
- Post-it notes (three different colours).
- Small stickers (two different colours) or two coloured pens (optional).

> *"If you have a big group of people in your workshop, you may want to split them into two or more discussion groups during the **Impact+ Exercise**."*

> *"Take pictures of the **Impact+ Tool** and materials as you progress through the exercise. They can be easily shared among partners and will help you if your workshop materials get lost."*

How much time do you need?

The time needed will depend on the size and complexity of the project.

You should allow at least half a day (3 hours) and potentially a whole day (7 hours). You may also need more than one workshop session.

You will also need to plan in breaks during the days in addition to the time for the exercise. These can be useful to help the facilitator and participants prepare for the next stage in the exercise.

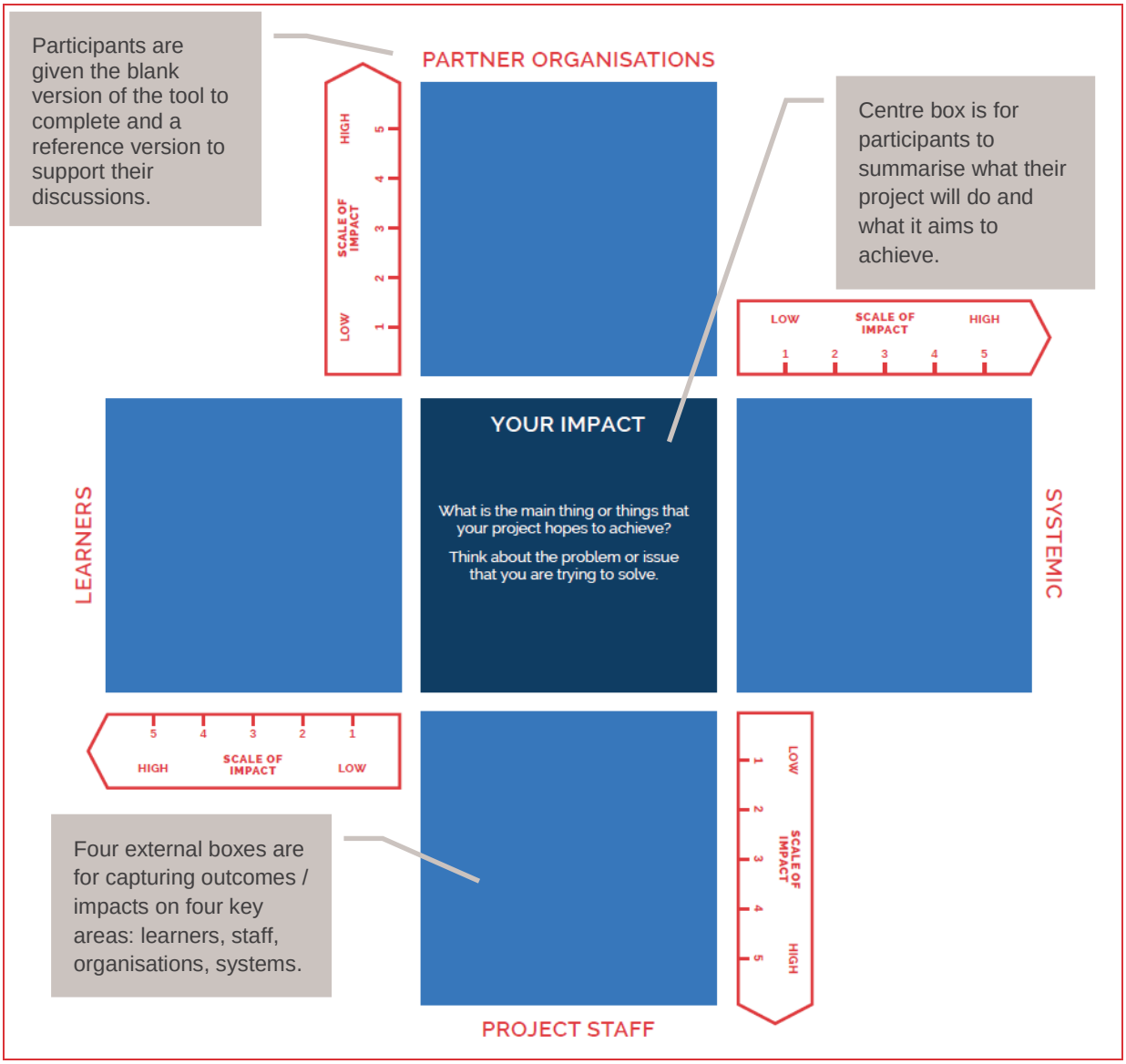
> *"Doing an icebreaker or social activity before starting the exercise can help participants to get to know each other and make the discussions start well."*

Impact+ Exercise Stage 1: Aims, Outcomes and Impacts

The first part of the workshop uses the **Impact+ Tool**. There are two versions of the tool:

- a reference version which includes prompts for users; and
- a blank one for users to complete or write on.

*Figure 1: Features of the **Impact+ Tool** (blank version)*



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Features of the Impact+ Tool

1. Central box – 'What are you trying to achieve?'

   - Workshop participants discuss the aims and activities of their project. They write a short statement of what their project intends to achieve in the box and can use this for reference during the exercise.

     "For example, your project may aim to improve the quality of employability education and training by developing new training courses and materials for teaching staff."

2. Four side boxes

   - These four boxes represent four different areas of potential impact for projects:
     - Partner organisations;
     - Learners (individual students or staff depending on the project focus);
     - Systemic (the sector, subject area of the project, peer or beneficiary networks, policy or legislative change); and
     - Project staff (those managing and coordinating the project).
   - These boxes are for participants to add in outcomes or impacts of their project associated with each of the different areas of potential impact. How this is done is explained later.

3. An impact scale on each side box

   - The scale runs from 1 (low) to 5 (high) and allows participants to rank their expected project impact against each area of potential impact.
   - A large number of impacts or outcomes listed in the box will not always result in a 'high' impact rating. It depends on what those impacts or outcomes are.
   - The different rankings help participants identify where their projects main impact will be. They can then focus on exploring those areas in more details. For example, some projects will focus on improving the experience and outcomes for individual learners. Other projects will primarily aim for systemic change by improving professional practice or policy.

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How the Impact+ Tool works

The tool is used in four steps.

Step 1: discussing core project aims and activities

- The group should discuss their project and aim to include a short statement of their aim and intended impact(s) in the centre box.
- The statement should clearly say what their project wants to achieve, i.e., the overall change or impact their project will have. This will act as a reference point for the workshop.

> *"Make sure that the statement is short and clear. If an existing project summary is available ask all participants to read it for preparation before the workshop and provide a copy on the day."*

Step 2: discussing the expected changes (outcomes and impacts)

- Participants discuss changes they expect to occur as a result of the project. They write their suggestions on a sticky note and put them in the appropriate side box.
- There is no limit on the number of notes that they can put in each box. But participants should be realistic about the changes they suggest.
- The changes will probably be a mixture of 'outcomes' (short-to-medium term changes) and impacts (longer-term change). At this stage, it's not essential to make a clear distinction between 'outcomes' and 'impacts'.

> *"The workshop facilitator should query notes if they think they cannot be justified or should be in a different side box ("Are you sure about that?"). But the facilitator should not remove or move any notes themselves."*

Step 3: discussing the impact scale

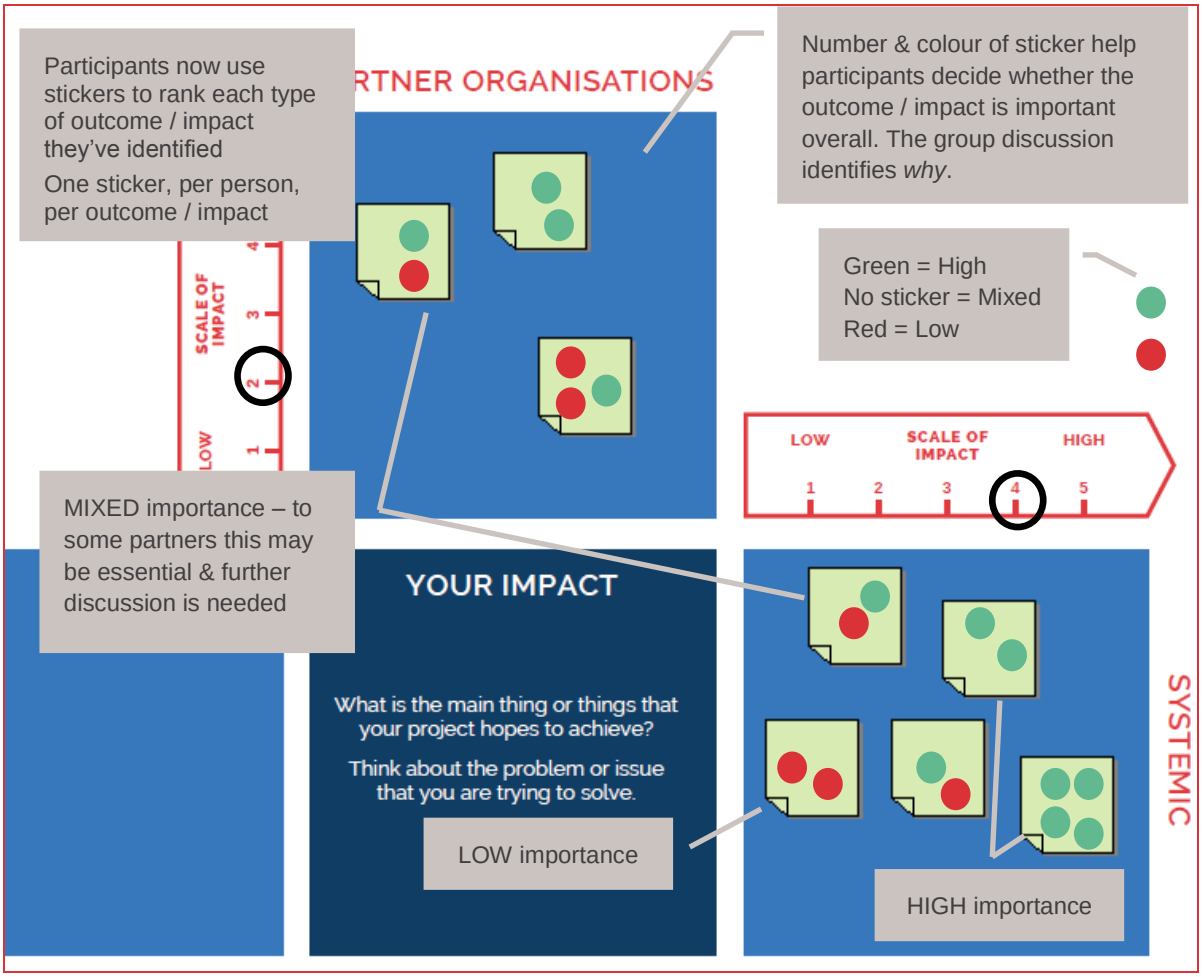
- The group should discuss the outcome / impact notes in each of the side boxes. The aim is to rate how important the notes in each side box are to the achievement of the overall intended aim in the centre box.
- The impact rating should focus on the nature of the outcome / impact and not just the number of notes. For example, many of the outcomes / impacts suggested could be fringe benefits that occur as a result of the project, but are not essential to the achievement of the overall aim.
- The aim of this step is to help projects identify the area where they will have most impact. It will help them understand where they need to focus their energy and resources. Side boxes should not all be rated five out of five.

> *"Side box impact ratings should be different. The workshop facilitator should query side box ratings if they are all the same or similar. Use the statement in the central box to help adjust the ratings."*

Step 4: rating outcomes / impacts

- This stage is optional. You may want to miss this step if you only generated a small number of notes in step 2. But if you have a lot of notes participants may find this step useful to help filter out those that are least important to their project.
- Participants should select the highest or one of the highest ranked sideboxes for the next step. This is because these are the most important areas of potential impact for their project. In the example above, they should select 'Systemic' or 'Partner organisations'.
- Give participants a set of coloured stickers or pens – red and green. Each participant should now rate every note in the chosen sidebox:
    - Green sticker = very important
    - No sticker = mixed importance / unsure
    - Red sticker = not at all important
- When rating each note participants should consider how relevant the outcome / impact on the note is to the aims stated in the centre box and how strong the link is to their project activities.
- The box should look something like those in figure 2.

*Figure 2: Using the **Impact+ Tool** (blank version) – Steps 1-4*



- Depending on the time available, you can repeat this stage for all the side boxes.

Impact+ Exercise Stage 2: Exploring Indicators

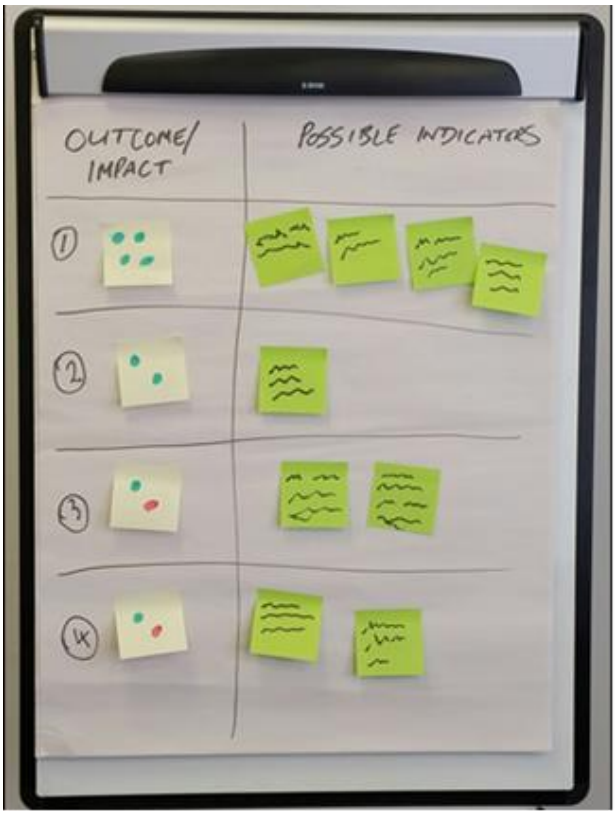
Exploring indicators for your outcomes and impacts

- During this stage participants discuss each of their outcome / impact notes and think of ways to measure them.
- First, the group should transfer the outcome / impact notes from the most important side box to a large flipchart sheet.

> *"If you have done the rating exercise in Stage 1 – Step 4 (above), you can just select the outcome / impact notes that are most relevant to your project."*

- See the first column in figure 3 below.

Figure 3: Exploring indicators for your outcomes and impacts



- There are two ways that your group can do this session.

  1. Participants can discuss and agree indicators for each outcome / impact in turn as a group; or

  2. Participants can each write suggestions for indicators on sticky notes and add them to the flipchart sheet alongside the relevant outcome / impact note. They should discuss the suggestions as a group afterwards to agree on which ones to use.

- Indicators can be relevant to more than one outcome / impact.

- You can put as many indicator suggestions alongside each outcome / impact as you want.

- Use a different colour label to the outcome / impacts in case the note falls off the flipchart sheet – then you can easily work out where it should be placed back.

"Indicators will vary depending on what your project intends to achieve. They could include:

- *increased satisfaction from learners;*
- *a positive reaction from employers;*
- *successful accreditation of a qualification or course.*

Some examples of indicators are on our website: https://www.erasmusplus.org.uk/impact-assessment-resources."

- You can put as many indicator suggestions alongside each outcome / impact as you want.

"Having multiple indicators is useful in case one proves impractical or impossible to collect data for. Having several indicators that demonstrate your outcome / impact will also strengthen your evidence case."

- Use a different colour label to the outcome / impacts in case the note falls off the flipchart sheet – then you can easily work out where it should be placed back.

"The workshop facilitator should prompt participants to try and make sure that that proposed indicators are realistic and relevant to the outcome / impact they will measure."

Impact+ Exercise Stage 3: Data Sources & Data Collection

Exploring data sources and data collection

- During this stage participants will discuss each of their suggested indicators from Stage 2 and think of potential data sources and data collection methods for them.
- First, the group should transfer the indicator notes a second flipchart sheet. This will look like the first two columns in figure 4 below – the group will complete the third column during this stage.

Figure 4: Exploring indicators for your outcomes and impacts

- There are two ways that your group can do this session.

  1. Participants can discuss and agree data sources and data collection methods for each indicator in turn as a group; or

  2. Participants can each write suggestions for data sources and data collection methods on sticky notes and add them to the flipchart sheet alongside the relevant outcome / impact note. They should discuss the suggestions as a group afterwards to agree on which ones to use.

- Data sources / collection methods can be relevant to more than one indicator.

- You can put as many data source / data collection method suggestions alongside each indicator as you want.

> *"It's useful to have several different data sources for each indicator. If two or more data sources indicate a positive change, it will make your evidence case stronger. Having several data sources is also helpful if one source proves impractical to collect or the data proves unreliable."*

- Data can be qualitative or quantitative – both are valuable.

- Use a different colour label to the outcome / impacts in case the note falls off the flipchart sheet – then you can easily work out where it should be placed back.

> *"Try and think of data sources that your project and partners will already have available. How can you use student record systems? Can you use or add to existing staff and learner surveys?"*

- During the discussions the workshop facilitator should prompt the group to consider when the data will be collected and how. For example, in the case of a participant survey:

  - At what point in the project will they survey participants?
  - Who will do this?
  - How will they do this? (Online, face-to-face, postal)
  - What resources will they need?

- Now you can repeat Stages 2 and 3 for the remaining side boxes if you wish.

Impact+ Exercise Stage 4: Round-up and bringing it all together

- This stage brings the **Impact+ Exercise** to a close.
- The workshop facilitator should explain how all the work done so far can be brought together into a table to summarise the project.
- A blank table would look something like this:

*Table 1: Example **Impact+ Exercise** table*

	Impacts / Outcomes	Indicators	Data sources	Short term	Medium term	Long term
Systemic						
Organisations						
Learners						
Staff						

- Participants can populate the table during the workshop or leave this for someone to complete later.
- Although you have completed the **Impact+ Exercise**, your work is not quite finished. There are still some things you need to do:
    - Review and refine the indicators and data collection methods afterwards to design data collection tools and work on definitions.
    - Think about developing a Logic Model, Theory of Change or a Pyramid of Change. Some useful resources to help you are available on our website: https://www.erasmusplus.org.uk/impact-assessment-resources.
    - Think about crucial inter-linkages or dependencies between outcomes, indicators and impacts. What things do you really need to do or deliver to achieve your impact?

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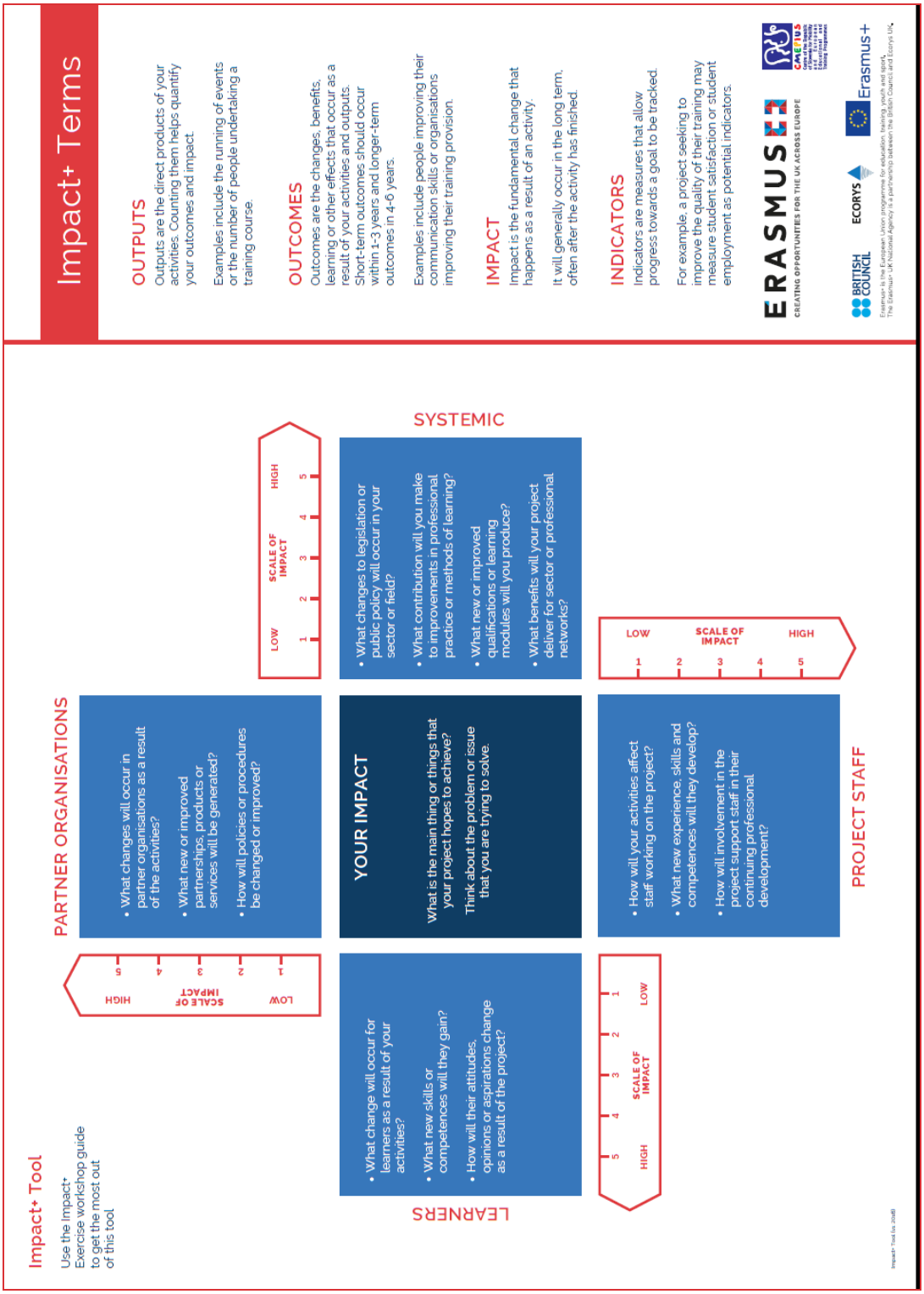
Annex 1 Impact+ Tool