

# IMPACT+ EXERCISE USER RESEARCH

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## 1. SUMMARY

This report sets out the findings of research into the use of the Impact+ Exercise in helping individuals and organisations understand how to assess the impact of their Erasmus+ projects. Two specific research questions were examined:

- Did the Impact+ Exercise help individuals to identify and understand the impact of their Erasmus+ project?
- Has using the Impact+ Exercise resulted in any changes in the way the individual and their organisation approach impact assessment?

The research used one-to-one telephone interviews with individuals who attended a UK Erasmus+ National Agency workshop on using the Impact+ Exercise, in May 2016. Semi-structured questionnaires were used to collect qualitative and quantitative data from interviewees located in eight EU member states; questionnaires were informed by feedback from the Manchester event. Case studies were also used to provide additional insight and understanding of the rewards and issues involved in using the Impact+ Exercise; and to provide concrete examples of how Erasmus+ projects have used the Impact+ Exercise approach.

The findings of the User Research relate to three research questions:

- **The use of the Impact+ Exercise**  
Seven of the respondents had used the Impact+ Exercise to measure impact in ongoing projects, either at the start of the project or during implementation, to discuss the concept of impact with partners and plan activities accordingly. The issue for those who had not used the Exercise was simply timing: their project had been well under way when they attended the Impact+ workshop and they found it difficult to incorporate the Impact+ Exercise into the impact assessment instruments already being used in their project. Some respondents had not fully understood how flexible the tool could be and the potential for incorporating it into existing projects.
- **The results of using the Impact+ Exercise**  
The majority of participants were highly positive about the May 2016 workshop, stating that the workshop had been very helpful or helpful in helping them to consider the impact of their Erasmus+ project. They described the main advantages of the Impact+ Exercise as being fairly simple and straightforward as well as clear, easy to use and very effective for structuring the way project applicants and project partners should consider impact. There was clearly, for some of those interviewed, considerably wider learning in terms of their understanding of the value of measuring impact; and a recognition that the Exercise could help them structure the way they thought about impact.
- **Dissemination and the broader impacts of the tool**  
The research clearly suggests that participants in the May 2016 workshop are disseminating the exercise more widely, both within their own organisations and with partners. Sixteen participants planned to use the tool to develop future applications; and almost all had recommended, or would recommend, it to partner organisations and project staff.

Use of the tool has moved beyond Erasmus+ projects to other funding streams; and some organisations had adapted the Exercise to fit their project in terms of different target groups and stakeholders. Several interviewees referred to the additional value of the Exercise in strengthening partnerships and engaging partners in considering impact.

## **Conclusions and recommendations**

The people interviewed for this research were highly positive about the Impact+ Exercise and see it as simple and straightforward, clear and easy to use and effective in helping organisations structure their approach to analysing and assessing impact. The workshop was well regarded; many attendees had since used the Exercise to evaluate projects or to develop new project proposals. Reservations related to the timing of the workshop which was less helpful after projects had begun; or to the desire for more time to learn to use it.

Our recommendations are shaped by suggestions from interviewees and relate to the rollout of the Exercise and potential additional support that could be provided to facilitate its use.

## Recommendations

- 1. We recommend extending the workshop to ensure that attendees have sufficient time to understand the exercise fully and, importantly, to practice using it.***
- 2. We recommend offering follow-up support to workshop participants to help reinforce their learning***
- 3. We recommend that the workshop should focus one section on the flexibility inherent in the Exercise, providing practical examples of ways in which organisations have adapted the Exercise to suit their project.***
- 4. We recommend that future workshops ensure that participants understand the potential for changing their approach to impact during the course of a project; together with advice on how the Impact+ Exercise approach can be used within existing projects***
- 5. We recommend an introductory workshop session to define and briefly discuss the terms used in the Impact+ Exercise, alongside some additional materials to support this.***
- 6. To help individuals and organisations move from output to impact measurement, we recommend that participants be provided with additional information and advice about ways of collecting data that more accurately helps evaluate impact; and about sources of data.***

## 2. INTRODUCTION

This report sets out the findings of research into the use of the Impact+ Exercise in helping individuals and their organisations understand how to assess the impact of their Erasmus+ projects.

Erasmus+ is the EU programme for education, training, youth and sport. Running from 2014 to 2020, the programme supports activities across higher, further and adult education, schools and youth activities. Erasmus+ is managed in the UK by the UK National Agency, a partnership between the British Council and Ecorys UK. Part of the National Agency role is to help achieve the maximum impact for the funded activities, and to help projects to achieve this.

The UK National Agency (NA), in partnership with the Slovenian NA and with input from several other NAs, designed a set of support materials collectively called the Impact+ Exercise to help Erasmus+ beneficiaries explore, identify and evidence the impact of their project activities. The Exercise was tested with 25 project leads during a workshop in Manchester in May 2016, with the objective of testing the effectiveness of the tool before making it more widely available. As part of this testing, Ecorys commissioned Access Europe to carry out User Research with participants who attended the workshop, to investigate the impact of using the Impact+ Exercise.

### 3. RESEARCH OBJECTIVES

The key purpose of the research was to understand whether, and how, the Impact+ Exercise has helped users to explore and understand the impact of their Erasmus+ project; and to identify any changes users have made to the way they now approach impact assessment personally, and more widely within their organisation. There were two specific research questions:

- Did the Impact+ Exercise help individuals to identify and understand the impact of their Erasmus+ project?
- Has using the Impact+ Exercise resulted in any changes in the way the individual and their organisation approach impact assessment?

## 4. METHODOLOGY

Our methodology centres on one-to-one telephone interviews with those who attended the Ecorys Impact+ Exercise workshop in May 2016. Interviews were identified as the most appropriate means of collecting qualitative and quantitative data from interviews located in eight EU member states (AT, FI, HU, IT, NL, SE, SI); and telephone interviews, as opposed to online surveys, also allowed for the probing of open-ended questions.

We used semi-structured questionnaires with both pre-coded and open questions to provide a mix of data: pre-coded questions were analysed quantitatively, alongside a content analysis of the richer qualitative data. The list of questions was sent in advance to participants. Comments from Ecorys were taken into consideration when drafting the final topic guide. We analysed the feedback report filled in by participants about the exercise and the material used during the workshop in Manchester. This was a useful resource for drafting the topic guide as they provided interesting information about the potential areas of improvement for the Impact+ Exercise.

Contacting interviewees proved challenging, but having made several efforts to contact them via telephone and email, as well as an online survey to book interview times, we succeeded in interviewing 20 of the 24 who opted into further research. Interviews varied in length, between 12 and 55 minutes in most cases, but commonly lasted about 25-30 minutes. They were recorded and transcribed. Interviewees were informed at the start of the interview that their personal information will be processed in accordance with the Data Protection Act and their comments will remain anonymous. They could also opt out at any time if they wanted to.

Case studies have been used to provide additional insights into users' views and to support greater understanding of the issues and solutions, as well as the rewards, faced in exploring impact, potentially using the Erasmus+ Exercise. Case studies are designed also to provide an additional means of encouraging more Erasmus+ projects to use the Impact+ Exercise approach. Potential case studies were identified in interviews that highlighted specific approaches to the Impact+ Exercise; and second interviews were carried out to provide more detailed information on individual and organisational approaches.

## 5. FINDINGS

The findings of the User Research with participants are presented in three main sections that broadly cover the following research questions:

- **The use of the Impact+ Exercise:** did workshop participants use the Impact+ Exercise? If so, did they use it for their Erasmus+ project, other projects, or both? If not, why not? And if they used the exercise, how did they use it? And which data collection methods, data sources and analysis techniques did they use?
- **The results of using the Impact+ Exercise:** what changes in project management or impact assessment have participants made as a result of using the Impact+ Exercise? Are these limited to their Erasmus+ project? Have they applied these changes to other activities?
- **Dissemination and the broader impacts of the tool:** is the Impact+ Exercise being used elsewhere in their institution? To what extent? What changes to organisational practice have been implemented as a result of using the Impact+ Exercise?

### 5.1 Use of the Impact+ Exercise

Interviewees were asked questions to determine if they have been using the Impact+ Exercise since the workshop in Manchester a year ago<sup>1</sup>. Questions were designed to explore two possible uses of the Impact+ Exercise:

- In projects that have been approved and are being delivered, and
- At application stage to help develop proposals using an impact assessment approach.

Stages 2 and 3 of the Impact+ Exercise workshop explored indicators that can be used to measure the outcomes and impacts of a project together with the potential data sources and data collection methods related to them. For this reason, we also asked participants what kind of data collection methods or data sources they used as part of their project.

#### 5.1.1 *Assessing impact in ongoing projects*

Around half – seven – of the workshop participants had used the Impact+ Exercise to evaluate the impact of their project during the implementation phase of their projects. Six of these had used the Impact+ Exercise with their project partners, in partnership meetings, at two stages of the project cycle:

- At the start of the project to assess the project's potential impact, build their understanding of this and plan activities accordingly;

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<sup>1</sup> See in Annex: topic guide especially questions 2, 3a, 3b, 3c, 5a, 5b and 5c

- During the implementation of the project to discuss the concept of impact with project partners and examine the different areas of potential impacts.

Three participants had organised an Impact+ Exercise workshop with partners. Two of these had gone through the four stages of the workshop in around two hours, while the third had carried out the first stage only, looking at aims, outcomes and impacts, in a 30 to 45 minute exercise.

*'With the project we did it in just over two hours. I focused people in on specific impact statements that were taken from our proposal. I have done that for both our projects and I gave one impact statement from the proposal to each group'.<sup>2</sup>*

Three participants had presented the Impact+ Exercise to partners during a partnership meeting:

*'We did not measure the impacts but we sort of tried to more deeply understand the impacts of our project before proceeding with it. It was at the kick-off meeting, that we had a better understanding of what the impact was'.<sup>3</sup>*

Finally, one participant explained how the Impact+ Exercise had been used at the end of the project to help her to reflect on the project's impact, helping her gain a deeper understanding and appreciation of measuring and analysing the wider impact of her project.

*'Since I got invited to do the workshop in Manchester at the end of our project, I was writing the end of the final report. It helped me a lot in that stage to understand the impact. With the workshop I have got to understand that the impact has wider issues and the number of different target groups'.<sup>4</sup>*

Seven respondents had not used the Impact+ Exercise to measure the impact of their ongoing Erasmus+ project. The main reason for this was simply one of timing: when they attended the workshop in May 2016 their project was already running and project partners had already set up the evaluation tools to measure both the outcome and impact of their project.

Given that they had already established project evaluation tools, interviewees found it difficult to see how they could incorporate the Impact+ Exercise into the impact assessment instruments already being used in their project, when they needed to track progress against intended impacts as described in their proposal.

*'We did not want to change the framework because we were already half-way through the project at that point last May so it would have been silly to change what we were doing that was already working well. It would not have worked. But we did like the material presented in the workshop'.<sup>5</sup>*

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<sup>2</sup> Respondent 4 (i)

<sup>3</sup> Respondent 13

<sup>4</sup> Respondent 11

<sup>5</sup> Respondent 3

### 5.1.2 Using the Impact+ Exercise to support the writing of new proposals

Interviewees discussed the potential of using the Impact+ Exercise to support the writing of new proposals; and seven had already used the tool to develop new project applications:

*'I have made two applications – both Key Action 2 again. We were particularly interested to use the framework because informal carers are a very hard to reach group and we felt that the framework gave us a very clear structure to look, particularly regarding learning.'*<sup>6</sup>

*'I used the Impact+ methodology for writing the project to clarify for myself and the group I'm working with, the staff. We used this tool to clarify what was our position towards public local policies and partners as well to potential partners that we didn't consider at the beginning; and also what we would like to develop in terms of internal competencies, what we are lacking now and what we would like to develop internally.'*<sup>7</sup>

Twelve interviewees had not used the Impact+ Exercise to develop new applications. For five of these, the opportunity had simply not arisen because they had developed no new application since the 2016 workshop. However, three interviewees did not see potential for using the Impact+ Exercise to develop future project applications; and two had some reservations about using or recommending the tool to colleagues or partners. These reservations appear to relate to having had insufficient time to understand and practice using the Exercise during the Manchester seminar and a resulting difficulty in taking it forward:

*'I found it a bit tricky to use. There were different steps and you ended up looking at the next step instead of the one you were looking at. I can't remember which steps were difficult. But there was something there in the middle when we were supposed to choose the most important things.'*<sup>8</sup>

*'I practiced it for four hours with some new people so I don't have yet enough experience to say well it's a good tool. What I remember is the emphasis is that impact is showing what you have done and what you wrote down, and what you would have done in original application.'*<sup>9</sup>

The fact that these two participants were not planning to use the impact+ Exercise in the future is related more to the restrictions of the workshop, in particular the lack of time to fully familiarise themselves with the tool, rather than the tool itself.

In total, 16 interviewees expressed their intention to use the Impact+ Exercise to develop project applications and a few spontaneously mentioned the benefits of using it for other EU and national programmes as well.

*'What we can do is for future applications not only for Erasmus+ applications but also at the national level for ESF and other programmes, we have mostly one work package that focuses*

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<sup>6</sup> Respondent 3

<sup>7</sup> Respondent 1

<sup>8</sup> Respondent 15

<sup>9</sup> Respondent 16

*on measurement of impacts. When it is possible to do it, not in all the programmes, we ought to use the tool'.<sup>10</sup>*

Some interviewees believed the tool to be fairly inflexible, despite its being used by other projects in a flexible way. Although the tool is designed to be flexible, and some interviewees had adapted it to their needs, some had not understood that they could, for example, simply change the categories in the Exercise. Again, we see this as demonstrating that more time was needed at the workshop for attendees to understand fully the flexibility that is inherent in the Impact+ Exercise.

*'I think it could be used in all kind of projects. It's just a model that you can transfer to different projects. Not only Erasmus+ projects but all types of projects having impacts. It makes you aware of where you want to focus. The model presupposes that there are always learners as part of a project so I guess it is more for educational projects than others'.<sup>11</sup>*

### 5.1.3 Data sources and data collection

We noticed a difference between native and non-native English speakers in the understanding of the question on data collection methods/data sources used to evaluate project impacts. While native speakers tended to answer the question straight away giving examples of the types of tools they used, we generally had to repeat the question and provide some examples for non-native English speakers showing a lack of familiarity with the English vocabulary related to project management. As a result, we decided not to ask the question on impact assessment and evaluation tools (question 4c) as initially planned in the topic guide.

Most participants evaluated the impact of their project, including training materials and the quality of the training programme, through the use of feedback forms and surveys or questionnaires. They also generally collected data on project participants.

*'We have an external evaluator for the project who is also a partner. She created and disseminated different kind of spreadsheets about data collection and also for evaluating mainly the training materials and the project activities. It is an old-fashioned way because we are only using Excel spreadsheets with feedback forms and questionnaires'.<sup>12</sup>*

Data collection methods remained fairly simple, with some participants using questionnaires with only three or four questions. Despite being the lead on their Erasmus+ projects, interviewees were not necessarily responsible for their project evaluation and some struggled to give a clear description of their evaluation procedures. Only a small number of interviewees were able to describe in detail a method of evaluating their projects that involved not only feedback forms and surveys but also participant records, focus groups and interviews. In some cases, it appeared that interviewees were not aware of a wider range of potential data sources or methods.

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<sup>10</sup> Respondent 6

<sup>11</sup> Respondent 14

<sup>12</sup> Respondent 5

Interviewees had generally collected largely quantitative data focused on their output targets and it appears that they largely focused on outputs rather than evaluating outcomes or impact.

*'We are using how many participants we have. We are involved in multi-player events so we are using numbers. We are measuring all activities on social media and the website . . . For now, we are just using those statistics that we can get from participants and evaluation they give us on the training. We evaluate all outputs so we get a chance or some kind of feeling for the impacts. It is both statistical and what people are actually getting from the training'.<sup>13</sup>*

Only two interviewees indicated that they had surveyed participants before and after their involvement in the project activities in order to measure their impacts: others used only feedback forms to gather the opinions of participants on project activities, supplemented in some cases with a self-assessment of the benefits of taking part. They were therefore unable to measure with any accuracy the impact of their project activities on learners.

*'We survey the participants before they take part in the training and then we survey them again at the end and we measure the differences, the impact that has made. We measure their understanding and ability to deliver the learning of the training; we measure if they feel more confident in mentoring people, if they have learned the background knowledge and information to deliver the tools. So it is measuring three or four things'.<sup>14</sup>*

Our view is that a key achievement of the Impact+ Exercise workshop has been the realisation, by participants, that the results of their projects should not be captured only through quantitative but also qualitative data: several participants commented on their new understanding and appreciation of impact, as opposed to solely measuring outputs.

*'It made us understand that measuring impacts was more than measuring the numbers of people. It was about change, factor because of the training I have taken part in. it was getting us to learn that whole concept. We don't only focus on numbers but look on the qualitative elements of the activities'.<sup>15</sup>*

*'Previously we used questionnaires and data collection more, because we were more focused on the fact that we need to achieve goals and we need to achieve numbers, that we need to produce a certain amount of things. Now we are more focused on what we are going to achieve with that, and who is it for. It's more a qualitative approach than it was before'.<sup>16</sup>*

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<sup>13</sup> Respondent 20

<sup>14</sup> Respondent 9

<sup>15</sup> Respondent 9

<sup>16</sup> Respondent 12

## 5.2 Results of the Impact+ Exercise

### 5.2.1 Views of the Impact+ Exercise workshop

Three in four interviewees were highly positive about the May 2016 workshop, with 15 participants stating that the workshop had been either very helpful or helpful in helping them to consider the impact of their Erasmus+ project. The two interviewees who stated that the workshop had not been helpful also declared that they had learned from the workshop and one had used the tool to develop project applications. Their concerns were about the timing of the workshop: since their projects were already running, they believed that there was no real opportunity for them to change their evaluation approach and implement new ways of evaluating the impacts of their project.

*'We had already made the application and it was already submitted so we did not get much help but of course it made us think about the impact in more detail I would say . . . so even though we didn't have the opportunity to use the tool or the tool sets when making the application somehow we did find ways to more or less implement the results that I got from the workshop'.<sup>17</sup>*

*'Your application is like your Bible. There you kind of have a schedule with what your structure will be, your timeline and your main impact, objectives and indicators. You can fine-tune these details during the project process but you cannot change it thoroughly . . . It is a nice tool when you are composing your application. Once you have a project written, especially in Erasmus +, you cannot use this for the fundamental things but rather for the fine-tuning. When you are in application phase, you can really use. I think this is the main outcome of the interview'.<sup>18</sup>*

Several participants indicated that the time allowed for the workshop was insufficient and that a full day would have been preferable:

*'It was an interesting exercise but too compact in time. We would need a few more hours to really work with it. Part of the exercise was in small groups and there was a lack of time. That's the only negative or critical comment I would like to make'<sup>19</sup>.*

### 5.2.2 Advantages of using the Impact+ Exercise

Interview questions for this part of the user research were intended to determine the advantages and the direct learning of the workshop for participants; and to explore whether the workshop had resulted in any changes in the way projects were approaching project management and impact assessment.

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<sup>17</sup> Respondent 8

<sup>18</sup> Respondent 2

<sup>19</sup> Respondent 14

The main advantages of the Impact+ Exercise, as described by interviewees, are that it is fairly simple and straightforward as well as clear, easy to use and very effective for structuring the way project applicants and project partners should consider impact. There was clearly, for some of those interviewed, considerably wider learning in terms of their understanding of the value of measuring impact; and a recognition that the Exercise could help them structure the way they thought about impact.

*'I found it quite **useful because it's difficult to always know the effects of what you are doing, if you are reaching your targets and so forth. So bringing it down into those four aspects is an interesting way of doing it. . . It sort of focuses the thinking on important aspects: some are systemic, personal, organisational and of course, the inputs for learners. There is nothing new in it but it structures the way you can think about projects**'.*<sup>20</sup>

Participants found this framework particularly useful for developing applications in terms of describing what their project will achieve, and how it will do so. Impact is increasingly important at a time when European programmes are focussing greater emphasis on long-term effects and the sustainability of projects after the end of the funding period and the Exercise has been helpful in this regard.

*'When people think of impact they think of immediate impact. We can demonstrate to them that this is a long-term impact. It ties in with the sustainability. I'm aware that a lot of these projects fizzle out when they are finish. What we are trying to do is see how we move forward beyond the end of the life cycle and this is a very useful way of thinking about impact and how we are going to measure it going forward'.*<sup>21</sup>

Again, several interviewees mentioned time constraints in the workshop and believed that the workshop requires at least several hours to go through the four stages of the Exercise; they also stressed the need to allow enough time to use the tool effectively in the development of a new project.

*'It is a good tool but it takes a long time to use it, to go through the entire process and measure every step that he mentioned. I think it is useful but according to my experience, it is not easy. When we are developing a new project or working on something new in our organisation, time is a crucial part of it. It takes at least three hours to go through the whole tool'.*<sup>22</sup>

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<sup>20</sup> Respondent 14

<sup>21</sup> Respondent 4

<sup>22</sup> Respondent 5

### 5.2.3 Changes triggered by the impact+ Exercise

It is clear from some of the interviews that some of the respondents were fairly new to the concept of measuring impact. It appears that a key achievement of the Impact+ Exercise workshop has been to introduce participants to the concept of assessing impact and to the idea that outputs need to relate to data collected through a range of indicators and sources.

*'We knew that we should have been doing that before but somehow, we didn't know how to do it. So, we had this feeling that we should reflect more before starting but in fact it was almost impossible to do, because we didn't have the methodology to do this, I+ in this way was inspiring because we said "we can use this methodology which is very clear" and I also had the scheme with me which was helpful, with the post-it and so on'.<sup>23</sup>*

*'I think the I+ tool is useful because it focuses on different target groups to make you realise that you have impact on the staff in your organisation, the target group you are working with. It adds academic dimension, so it depends on what kind of impact you want to look at'.<sup>24</sup>*

## 5.3 Dissemination and broader impacts of the Impact+ Exercise

### 5.3.1 Disseminating the Impact + exercise

Our research suggests that participants in the Impact+ Exercise workshop in May 2016 are disseminating the Exercise more widely, both within their own organisations and with partners, and in some cases for use with partners in developing new project proposals. Sixteen participants declared their intention to use the tool for future applications, citing its simplicity as well as its ability to provide a common framework for evaluating impact.

Almost all participants had sought to disseminate the tool both within their organisation and with their partners, with 19 participants confirming that they have recommended, or would recommend, the tool to partner organisations and project staff. They appreciate, in particular, the way the tool helps define and fine-tune indicators, including target groups; and its effectiveness in facilitating communication between partners.

Some interviewees suggested that the Exercise is being used to influence the way their organisations and their partners approach the concept of measuring impact: one organisation had systematically shared the Exercise with clients and partners to influence the way they approached evaluation:

*'(Sent to) to all the partner organisations in my project and to other clients of my organisation and other partners who have implemented my way of thinking how to evaluate the effect'.<sup>25</sup>*

Workshops and meetings were the preferred formats for participants to disseminate the tool with their project partners and within their organisations. Additionally, respondents have taken

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<sup>23</sup> Respondent 1

<sup>24</sup> Respondent 15

<sup>25</sup> Respondent 10

advantage of networking opportunities to raise awareness about the tool and encourage colleagues and other organisations to adopt the exercise.

*'I involved the project team in my organisation and during the meeting when we have evaluation and dissemination part of the project we discussed... we actually used the tool to pick whether or not we are following it or whether or not we should improve'.<sup>26</sup>*

*'When I was back home, I used it myself. The tool is really helpful even for me as a project coordinator. I don't know how to describe it. It makes you more aware that you can have an impact all the time during the project, not at the end of the project or at the beginning of a project'.<sup>27</sup>*

### 5.3.2 The wider impact of the Impact+ Exercise

Some participants have adopted the Impact + exercise as a best practice tool for funding applications being developed within their organisation. Discussing the wider influence of the Impact+ Exercise, one interviewee confirmed that the Exercise had effected key behavioural change in his organisation:

*'We are now adopting the principle of impact in our funding applications so we do it as the norm. We were completing an application form today and we did that as the core design process for the user groups. The programme was written around impacts so we are using it continually now'.<sup>28</sup>*

Interestingly, the tool is being used more widely than for the development of Erasmus+ applications, or for assessing their impact. It is applied by some respondents across a range of different funding programmes, taking full advantage of the flexibility and adaptability of the Exercise across a wide range of project development.

*'Not only EU programmes. You know, there are private foundations who have applications for non-profit organisations all around Europe. They don't have a strict system so if we want to apply and develop a good project, this tool can be helpful'.<sup>29</sup>*

Several respondents referred to the impact of using the tool on individuals involved in projects, as well as on their organisation's approach to evaluating impact.

*'It had an influence on the student's level who participated in the project, the teachers who were involved and of course we have a number of effects on our organisation on how to work, on communication, internships. It is a really good tool to improve mobility at home'.<sup>30</sup>*

In some cases, individuals who had attended the May 2016 workshop had not only used the Impact+ Exercise, but had started to amend the Exercise to reflect the requirements of individual projects. The Exercise has specifically been designed to offer the flexibility of being

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<sup>26</sup> Respondent 12

<sup>27</sup> Respondent 11

<sup>28</sup> Respondent 9

<sup>29</sup> Respondent 5

<sup>30</sup> Respondent 11

adapted to different contexts, different projects and different programmes, and several respondents had taken full advantage of this by adjusting the tool to their own varied needs.

*'My slightly amended version includes the employers. In my project in healthcare, I am working with employers as well as with people who are just carers. I think it is open to... For one of the bids, we have included families because we will be working with families of people that receive care. So we are adding in extra aspects as needed. We stick with the original four components and we add extra ones as we need them to make it specific, more tailored'.<sup>31</sup>*

An incidental and very positive outcome has been the Impact+ Exercise's contribution to partnership working. The use of the Exercise and its dissemination among partner organisations has been seen as strengthening contacts, improving communication and facilitating greater knowledge sharing in general. One of the participants highlighted the personal benefits of the tool and explained:

*'I've learnt about other cultures, it's a really simple one but sometimes people don't recognise that. They don't necessarily think all those things are great but it's not directly connected to the project per se but it's good to actually remember how and celebrate that. It encourages them to get more involved with the project than they are at the moment'.<sup>32</sup>*

Finally, participants also added that dissemination was more challenging within large organisations where they had less capacity to drive change and implement new tools.

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<sup>31</sup> Respondent 3

<sup>32</sup> Respondent 4 (ii)

## 6. CONCLUSIONS AND RECOMMENDATIONS

### 6.1 Conclusions

The people interviewed for this research were highly positive about the Impact+ Exercise: it is perceived as simple and straightforward, as well as clear, easy to use and effective in helping organisations structure their approach to considering the impact of their projects.

Every interviewee found the Manchester workshop useful, and many had used the Impact+ tool during the year since the workshop, either to help evaluate projects or, more often, to help develop new funding proposals. Interviewees referred to a range of benefits derived from using the exercise, including benefits for projects, organisations and partnerships.

Some interviewees had reservations about the Exercise, but these were almost entirely related to the ability to implement the Exercise after only one workshop; or to a lack of understanding about the how the Exercise could be applied to specific projects, especially those already under way. Some interviewees suggested ways in which the workshop and support for using the Exercise could be improved, many of which have shaped our recommendations.

Several interviewees identified wider benefits gained from using the Impact+ Exercise. These included using the Exercise to develop projects and, even more positively, using the Exercise to shape their personal, or their organisation's, recognition and understanding of impact measurement. This suggests that using the Exercise has effected a significant change in the behaviour and approach of individuals and organisations towards impact: an outstandingly positive outcome of the Exercise.

Suggestions made by interviewees, alongside our understanding of the Exercise and interpretation of interviews, have helped shape our recommendations. These relate to the future rollout of the Exercise through some changes to the organisation of workshops; and to additional support that could usefully be provided to facilitate its use in new and existing projects, both Erasmus+ and other programmes.

### 6.2 Recommendations

Our recommendations relate largely to the support provided to participants in the Manchester workshop and in the months following it. In some cases, participants had not absorbed some key factors in the use of the Exercise; several felt the workshop had not given them enough time to practice using the tool; and some found, when they came to use the Exercise some months after the workshop, that they could not recall some of its elements.

- 1. We recommend extending the workshop to ensure that attendees have sufficient time to understand the exercise fully and, importantly, to practice using it.***
- 2. We recommend offering follow-up support to workshop participants to help reinforce their learning***

Although the Exercise is designed to be flexible and adaptable to different projects and programmes, with varied target groups and stakeholders, several interviewees were unaware of this facility. For them, this was a barrier to using the Impact+ Exercise.

- 3. We recommend that the workshop should focus one section on the flexibility inherent in the Exercise, providing practical examples of ways in which organisations have adapted the Exercise to suit their project.***

Several interviewees with live projects found it difficult to see how they could use the Exercise alongside, or in addition to, the evaluation mechanisms proposed in their Erasmus+ application: some believed that it was impossible to review or change their approach to measuring impact in the course of the project.

- 4. We recommend that future workshops ensure that participants understand the potential for changing their approach to impact during the course of a project; together with advice on how the Impact+ Exercise approach can be used within existing projects***

During the interviews it became clear that some participants were not familiar with some of the terminology used to discuss and measure impact in English, either because they are non-native English speakers or because the concept of measuring impact is new to them. For the workshops and any additional guidance to maximise effectiveness, it is important to ensure that all participants start with a shared understanding of the terms used.

- 5. We recommend an introductory workshop session to define and briefly discuss the terms used in the Impact+ Exercise, alongside some additional materials to support this.***

Some workshop participants were not responsible for project evaluation, or were engaged in measuring impact for the first time. Most interviewees were focusing on outputs rather than outcomes, were using very simple collection methods and were collecting quite sparse evaluation data.

- 6. To help individuals and organisations move from output to impact measurement, we recommend that participants be provided with additional information and advice about ways of collecting data that more accurately helps evaluate impact; and about sources of data.***

## 7. CASE STUDIES

Case studies have been selected to throw further light on how organisations have used the Impact+ Exercise and how its use has affected the way organisations approach measuring impact. They illustrate the use of the Exercise to help develop successful funding applications; how the Exercise can be adapted to tailor it to a particular project; the use of the tool in different contexts; and the use of the Impact+ Exercise to measure impact and track progress during the implementation of a project.

## LANCASTER UNIVERSITY

### PROJECT: HELPCARE

#### *Using the Impact+ Exercise across an organisation to support applications to varied programmes*

Lancaster University leads the Helpcare project, which works with carers and companies that provide care to identify the main issues affecting recruitment and retention of workers; and to develop learning materials and qualifications that will help professionalise care. Other partners are located in the UK (Lancaster and Morecambe College), Bulgaria (Zanie Organisation), Greece (SEERC), Poland (University of Lodz) and Italy (Communie di Ortona).

#### **Use and benefits of the Impact + Exercise**

Following the workshop in Manchester, Lancaster University used the Impact+ Exercise to develop its applications for two Erasmus+ KA2 projects and a Horizon 2020 project. A slightly adapted version of the Impact+ tool was also used to apply for funding from the Economic and Social Research Council (ESRC).

Lancaster University used the Exercise to consider, anticipate and quantify the impact of a project. Reflecting on the changes resulting from using the Exercise, the project manager stated:

*'I think the main difference is that I am much more careful to quantify what sort of impacts there might be. I am also much more careful to split it up into different stakeholder groups. I think that's an important difference. For example, now I would talk about the target groups for impacts and I would separate them out whereas I would not have separated them out necessarily before but just put impacts together. And I would split up the different parts of the evaluation of impacts. So I would now talk the formative evaluation, the process evaluation and the summative evaluation of impacts'.*

In cooperation with its project partners, Lancaster University adjusted the Exercise by increasing the number of categories for stakeholders to better reflect on the impact of the project.

The modification helped strengthen the partnerships for all three proposals by supporting communication and agreement between partners. The Impact+ tool provided a framework for applications by creating categories, possibilities to add target groups and tailoring the tool for other programmes. Similarly, the tool has provided a structure for evaluating and has helped differentiate between formative evaluation, process evaluation and summative evaluation.

The tool proved to be particularly useful for national funding programmes, which increasingly focus on impact and require impact summaries. The tool delivered extremely positive results with, for example, very high impact scores for a Horizon 2020 application.

## UNIVERSITY OF NORTHAMPTON

### PROJECT: Equity and Social inclusion through Positive Parenting (ESIPP)

#### *Adapting the Impact+ Exercise to reflect specific project requirements*

Staff at the University of Northampton have used the Impact+ Exercise to measure impact for several projects. In particular, the Exercise was used for the *Equity and Social inclusion through Positive Parenting* (ESIPP) project which involves developing parent education in autism. This project works with nine strategic partners in south east Europe, including Cyprus, Croatia and the Former Yugoslavia Republic of Macedonia, including academic institutions, non-government and government organisations, small business and charities. Through working together, they wanted to develop parent education, evaluate it and ensure that the project would remain sustainable.

#### **Use and benefits of the Impact + Exercise:**

University staff found the Impact+ tool be extremely useful, both in developing impact and in providing a useful understanding of how the EU define impact and the type of impact that needs to be evidenced. The Impact+ tool was useful for the ESIPP project and allowed the team to look at outputs, outcomes, indicators and defining impact. The Impact+ tool for the ESIPP projects created additional benefits:

*'I think it been a really useful tool to enable us to get people to see that impact happens in a number of ways, and that impact, sustainability, dissemination is all intrinsically linked to each other and if nobody knows you're doing something you're not going to be having a lot of impact'.*

To ensure the tool would be used in a positive way, staff at the University of Northampton used the activity to develop a concrete understanding of what impact is. Working with the European Parliament and NGOs, there was a different understanding of what impact was and some organisations did not see the benefit in trying to understand the meaning of impact. The materials produced from the Impact+ tool were what allowed the staff to help partners gain a solid understanding of outputs, outcomes, indicators and how this works within a project. The accessibility of the tool provided an easier way to facilitate how to shape a project using the workshop guide and helped the team to consistently refer to EU standards which was an important factor in shaping the project.

The Impact+ tool facilitated the delivery of the project, enabling partners to see impact beyond the end of the project and to identify intellectual outputs and benefits – although it was felt that this was on the organisation's understanding the elements of the Exercise.

The University has now used the Exercise to develop three projects, and has successfully adapted each time to reflect the specific requirements of each project.

## LJUDSKA UNIVERZA VELENJE

### *How the Impact+ Exercise changed an organisation's approach to defining and measuring impact*

A public non-profit institution providing adult education with a strong experience of delivering Erasmus+ projects, Ljudska Univerza Velenje cooperates with numerous national and international partners on various national and international projects.

#### **Use and benefits of the Impact + Exercise**

Following the workshop in Manchester, the Ljudska Univerza Velenje team organised an internal workshop to discuss the impact of all projects, looking in particular at long-term impact. As a result of the Impact+ Exercise workshop, both project activities and data collection methodologies were modified.

The new approach was quickly adopted, within less than two weeks. As a result, members of the team decided to amend a number of their activities. They also modified their approach to data collection and opted for a more qualitative approach, in particular with the use of interviews.

*“We were more focused on the fact that we need to achieve goals and we need to achieve numbers, that we need to produce a certain amount of things. Now we are more focused on what we are going to achieve with that, and who is it for.”*

The objective was to improve the understanding of the project's impact, and in particular its long-term impact. This process also meant understanding that impact is sometimes difficult or not always possible to measure. The need for change was identified during one of the meetings:

*‘I would say in the beginning we never thought about the impact on the organisation and the staff involved. And now we are more aware that everyone in the organisation is changing depending on their level of involvement in the project. Whether that's language skills or maybe just being more open and more aware of the different approaches in education or being more open to the different people coming to our organisation’.*

Demonstrating the flexibility of the Impact+ Exercise and how it can be applied to all stages of the project, the organisation has also used the Exercise for projects already completed with the objective of fine-tuning their analysis. Finally, the Impact+ tool, which is shared with other project partners, was also used by educators and in different settings and formats as an impact tool.

## CENTOFORM

### PROJECT: INCLUSI\_VET

#### *Using the Impact+ Exercise to support partnership development through positive debate*

Centofrom is an Italian business management consultancy which write project proposals for its own educational centre. These include a VET project based around building construction sectors and a project for migrants, INCLUSI\_VET. The consultancy also writes projects for local partners which are largely educational, focused on institutions such as high schools and companies.

#### **Use and benefits of the Impact+ Exercise**

The Impact+ tool was used to clarify their position towards public bodies and potential partners through stimulated debate and developed a shared understanding of objectives, effectively, helping to define the project causing the team to think about the priorities and objectives they wanted to achieve. The use of the Impact+ tool provided clear questions leading the project leader and her team in a positive direction and building a shared understanding with the partnership. Significant changes shaped the way in which they understood partners and sought to gain more of a relationship due to the long-term objectives they wanted to achieve.

Reflecting on how she realised partnership was important to the Centofrom team the project leader said:

*'We tried to understand which were the partners we wanted to work with considering the long-term objective of our company. And we went to meet them companies and other training centres, explain why we want to write that project and which were the benefits they would get from it. Not only link it to the project but for the entire collaboration going a little bit beyond the project and this for us was also a new thing because in the years before we were very focussed on the single project but it could happen that we worked with one partner on a project and didn't consider the same partner for another project or changing quite a lot the shape partnership. So we are trying to develop more collaborations with some partners and this can be helpful.'*

The organisation wrote their application using the structure which they had developed during the design of the project: this reflected the Impact+ Exercise.

## ANNEX 1: TOPIC GUIDE

### Introduction

Good morning. I am [.....] and I'm calling from Access Europe Network.

You have recently received an email from Steven Murray from Ecorys and the Access Europe team asking you to participate in a follow-up survey on the impact+ Exercise due to your involvement in the workshop in Manchester on 26<sup>th</sup> May 2016. At that time I understand that you also opted into further research on the Impact+ Exercise.

We would like to discuss the use of the Impact+ Exercise and ask you some questions. The interview will last about 30 minutes. Do you agree to proceed with the interview? You are able to opt out at this stage if you want to.

For practical reasons, we would like to record the interview. Is this ok with you? Anything you say will be anonymous.

Are you ready to begin?

Just to have a bit of a background, I would like you to briefly describe your Erasmus+ project (*Help: ask for main objectives and target groups if these don't come up spontaneously*).

## Questionnaire

Now that I understand your project better, I would like you to think about the Impact+ Exercise workshop you attended in May and the lessons that you took away from it.

**1. Can you tell me how helpful the workshop was in helping you to consider the impact of your Erasmus+ project? (Don't read out responses)**

- Very helpful
- Helpful
- Neither helpful or unhelpful
- Not helpful
- Not helpful at all

**If (very) helpful:** what has been particularly helpful for you in the Impact+ Exercise? (*Help: did the exercise help you think about certain aspects of the project differently? Did it change the way you thought about evaluating impact?*)

**If not helpful/ neither:** why you thought that the Impact+ Exercise was not suitable for your project?

**2. Have you used the Impact+ Exercise to measure the impact of your Erasmus+ project?**

- Yes
- No **(skip to 4)**

**3.a. When did you use it? (Don't read out responses)**

- At the start of the project and used it throughout project delivery
- In the middle of delivery and used it until the end
- At the end of the project and used it for the final report

**3.b. Could you describe briefly how did you carry out the exercise?**

➔ Prompt: Have you worked on it alone or in a team? Whom did you involve? How did you work together, i.e., the format: a meeting, a workshop, a conference call, etc.? Who led it?

➔ How long did it take you to complete it?

**3.c. Did your project partners use the Impact+ Exercise? (Don't read out responses)**

- Yes, all of them
- Yes, but only some of them
- No, we carried out the Impact+ Exercise as a lead partner on our own (skip to 3.d.)
- No, our partners have use their own impact assessment tools (Explain what type of tools do they use and why) (skip to 3.d.)

**3.d. Have there been any changes to the way you delivered your Erasmus+ project, as a result of the Impact+ Exercise?**

- Yes – Could you describe what have you done differently?
- No – Has the exercise confirmed that your current practice works well?

*Ask specifically for changes in the way the activities were planned and delivered.*

**3.e. Which data collection methods/data sources have you used / are you using to evaluate the impact of your project? (Don't read out responses)**

- Management data/monitoring
- Participant records
- Surveys
- Feedback forms from the events
- Focus groups
- Interviews

**Did the Exercise help you identify or decide on methods/sources?**

- Yes – Explain how:
- No

**3.f. Are you using the Impact+ Exercise for other projects or activities you are delivering or have delivered?** *(Don't read out responses)*

- Yes, for all our projects
- Yes, for some of our projects
- ➔ What types of projects? (i.e. Erasmus+, other EU, non-EU projects) When: application stage, throughout the project, at the end?
- No, but we are planning to use it in the future
- No, and we are not planning to use it

**3.g. Is the Impact+ Exercise used more widely in your organisation? (i.e. by other colleagues, at different departments, etc.)**

- Yes – Explain how it is being used:
- No

**3.h . Have you encountered any difficulties when using the Impact+ Exercise? Is there anything that you would like to change about it? (skip to 5)**

- Yes – Could you describe what those were? How could it be improved? What wasn't clear? (*Ask for the tool, workshop guide and the video*)
- No

**Question 3 & 4: only for those who answer No at question 2.**

**4. Why haven't you used the Impact+ Exercise to measure the impact of your project? (*Don't read out responses*)**

- We are using a different approach to impact assessment as an organisation. What approach?
- We did not feel that the Impact+ could help us deliver better evaluation – Why?
- We have not assessed the impact of our project yet, but are planning to do it using Impact+
- We have not assessed the impact of our project yet, but we are not going to use Impact+ (explain why)

**5. Does your organisation currently use any other impact assessment/evaluation tools or approaches to evaluate its impact? (*Don't read out responses*)**

- Yes – specify:
  - Theory of Change,
  - Logical Framework Approach,
  - SROI,
  - Other: .....
- No

**5.a. Have you used Impact+ Exercise to develop project applications?**

- Yes – Which ones? What was the outcome? Did the exercise help?

No

**5.b. Are you planning to use Impact+ Exercise to develop project applications in the future?**

Yes – Which ones?

No

**5.c. Would you recommend / have you recommended it to others?**

Yes

No

*Explain:*

**5.d. Have you seen the video guide for the Impact Exercise? (launched Sept 2016 after the workshop)?**

Yes – what did you think about it? Was it helpful?

No

**5.e. Have you used any of the translated materials (ES, IT, FR, DE & PL)?**

Yes (what did you think about them? Were they helpful?)

No

**6. We talked about things that you would change about the Exercise. Is there anything else that you would find useful?**

**7. We are looking for case studies to illustrate the use of the Impact+ Exercise and more generally the added-value of impact assessment. If selected, would you be happy to be recontacted to discuss this in more detail?**

Yes

No

Wrap up:

These were all the questions that I wanted to ask today. Is there anything that you would like to ask me with regards to this evaluation?

Thank you very much for your time.