Impact+ Exercise User Research 2018

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Executive summary

Background

In April 2018 research was commissioned to assess the value of training workshops organised and delivered by the UK Erasmus+ National Agency in autumn 2017. The research assessed how individual participants had used Impact+ within their Erasmus+ partnerships since the training, and also how the tools had been used in other projects, or participant's mainstream activities. This report is the outcome of the research.

The research questions posed were:
1. Did the Impact+ workshop help individuals to identify and understand the impact of their Erasmus+ project?
2. Has their learning from the Impact+ workshop produced changes in the way the individual and / or their organisation approaches impact assessment?

Research fieldwork took place during April to June 2018, using a semi structured topic guide for telephone interviews with workshop delegates. A strategy for contacting interviewees was implemented within current data protection regulations. Interviewees were asked to opt in to the research and book an interview with the research team through an online booking system. Research interviews were carried out by Skype or telephone, recorded and transcribed for analysis. The projects which became case studies were asked to waive their anonymity and were also asked to review the case study for accuracy before inclusion in the report.

The research cohort

Of the 36 potential interviewees who attended training sessions, 20 interviews were achieved. In addition, a small number of additional interviews were completed to support case studies illustrating specific aspects of the implementation of the Impact+ training and toolkit. The project types interviewed were weighted slightly towards Adult Education (AE), with 12 AE projects and 8 Vocational Education and Training (VET) projects.

The mix of countries from which the interviewees were drawn were: 5 from the UK, 3 Hungary, 2 Slovakia, 2 Italy, 1 each from Croatia, Iceland, Sweden, Estonia, Spain, Ireland, Germany, Netherlands. There were a wide range of promoting organisations represented, including: private enterprises, government departments, arms-length public services, NGOs, Trade Unions/Social Partners, universities and industry/sector related bodies. There was also a cross section of agencies, including: IT companies, training agencies, health and social care organisations, consultancies, social work organisations, employment agencies, arts and cultural bodies, industry bodies, expert groups and academic institutes and foundations.

The overarching objectives of the range of different projects interviewed were very widely varied, representing a cross section of Erasmus+ projects: increasing the take up of physical exercise to improve health wellbeing; improving basic literacy, numeracy and digital skills; increasing performance arts in rural areas; increasing access to the arts; and training in the safe treatment of bees.

The workshop

All 20 interviewees found the Impact+ Exercise workshops either useful or very useful. Most increased their understanding of impact assessment and project evaluation processes, and the importance of assessing impact within projects. For some more experienced in evaluation, it reinforced existing knowledge of impact assessment approaches and its value, and for the less experienced gave them exposure to some key concepts within impact measurement.

There was a reported increase in confidence of participants in using a tool and for exploring indicators, data sources and data collection methods after the workshop. Where their knowledge had improved, especially if they were experienced project coordinators, or had previous knowledge of impact measurement, participants went on to share the knowledge and understanding with colleagues and partners. Slightly more interviewees who had an evaluator or evaluation partner already in place were using the Impact+ Exercise than those who did not.

Interviewees enjoyed the participatory nature of the workshop and interaction with other project leads. The workshop prompted discussion and the exchange of ideas on measuring impact. For the less experienced the approach to the workshop and content materials provided a straightforward, simple, visual and structured way to engage in impact assessment work.

Most interviewees considered the case examples a valuable exercise, whilst a small number commented that not all the stages were covered in sufficient detail particularly on day 2.

Use of the Impact +Exercise (tool, translated materials, video)
Ten out of the 20 project leaders had used the Impact+ Exercise either with their organisational colleagues or with partner organisations for their current Erasmus+ Project.

Interviewees were using the tool to work with organisational colleagues to plan the next steps for delivery of the Erasmus+ project and to plan their approach to impact measurement with partners. Some participants used particular stages with partners to work through and focus down on indicators to measure outcomes and the sources of data and methods.

Eight of the 20 projects had introduced partners to the Impact+ Exercise. The majority of those that had not yet introduced the materials to partners were planning to in a future meeting.

Those that had not used the Impact+ Exercise had different reasons ranging from other pressing priorities, to an intention to introduce the exercise later, or another impact measurement approach being already in place. Some were reportedly using it only to frame their own thinking on impact measurement.

Seven of the 20 interviewed had not used the workshop materials in English, the translated version nor the video since the workshop.

For some of the interviewees the outcome of introducing the Impact+ Exercise was too early to state. For other interviewees the response from partner organisations had been positive, which has led to a shared understanding of measuring impact of their current Erasmus+ project.

Three of the 20 interviewed indicated that they had used the video, which had been a useful method to initially introduce the concept of impact assessment and the exercise to others, as well as acting as a refresher to the workshop participant.

Those that have used the translated materials found it useful to share with partner organisations and helped them follow the introduction of Impact+ more easily. However, the majority of those interviewed that were using the workshop exercise material were using the English version as this was the working language of the partnership.

Sixteen of the 20 interviewees had indicated that they had not adapted or further developed the Impact + materials and the majority had found the materials fit for purpose. Three of the 20 interviewees had adapted the material to either introduce colleagues to the concept of measuring impact or working with colleagues on particular stages of measuring impact.

Four interviewees did raise some difficulties in either using the Impact+ Exercise, video or translated materials. Examples were: how to apply the data and information already collected by their project to the scoring system; adapting the terminology for the purpose of their project; guidance/advice on valid data to measure the indicators identified; a perception that the training and tool conflated the terms outcomes and impact.

Eight of the 20 interviewees had used the Impact+ Exercise for other projects or activities, including: preparing proposals for other Erasmus+ projects; evaluation of 5-year service plans; and to inform impact assessment across all the European projects they were co-ordinating.

Seven of the 20 interviewees used the Impact+ Exercise with other colleagues within their organisation that were not directly involved in the current Erasmus+ project. Examples included: using it as part of their high

level strategic management planning process; team training to increase understanding of impact measurement within their department or organisation; and supporting their project development processes internally.

The outcomes of using the Impact+ Exercise (tool, translated materials, video)

Over half of the interviewees had made some level of changes to the way their Erasmus+ project was being delivered due to the Impact+ Exercise. Several interviewees have taken a more formalised or focussed approach to indicators, data sources and collection to measure impact either as the lead partner or across the partnership. Others used stage 1, aims, outcomes and impacts to provide a clearer structure to a final evaluation, while some had used the exercise in the project design stage to shape the project and identify data to be collected.

Over half of the interviewees were adjusting their professional approach to evaluation as a result of the Impact+ Exercise. For some it helped them conceptualise the change they wanted and how they measure this. For others it provided a structured way to raise discussion with team members or partners on what the project intended to achieve and formalising a common measurement framework. For some, it had expanded their thinking and on types of indicators and methods of data collection.

The approach had strengthened partnership working by prompting discussion on a shared understanding of impact and measuring impact and outcomes. The exercise has facilitated agreements on indicators and sources of data because the framework of the exercise had enabled a straightforward, structured approach to considering impact.

The majority of the interviewees stated they would recommend the Impact+ Exercise more widely beyond their own organisation and the partners of the current Erasmus+ project.

Conclusions

1. Did the Impact+ workshop help individuals to identify and understand the impact of their Erasmus+ project?

The Impact+ workshop and materials have influenced a majority of the individuals trained, including the processes of collaboration in partnerships, project methodologies and project processes.

The workshop increased participant knowledge and confidence around impact measurement, whatever their previous level of experience was. A number of workshop delegates went on to become an advocate of Impact+ within their organisation and partnership and to cascade the methodology.

The simplicity of the tool, its design, its clear steps and its accessible materials were valued. None of the projects had utilised the tool throughout a project cycle but the tool is reported lead to more effective thinking on indicators and data collection methods and on project goals to demonstrate impact.

 2. Has their learning from the Impact+ workshop produced changes in the way the individual and / or their organisation approaches impact assessment?

The impact of Impact+ on individuals varies depending on their previous knowledge and experience.
For the less experienced, the workshop influenced their confidence with the methods, but some needed additional support to embed it within their project.

For the more experienced, the workshop helped them quickly introduce Impact+ to others. Some of this group would have liked a higher level workshop to directly support them in cascading the methodology.

There were also individuals who had simply not found time to introduce Impact+ to others.

A number of interviewees were using the materials to guide them with project design, project implementation and project evaluation both for Erasmus+, and other programmes and projects. The tool has proven useful in developing bids, contracting frameworks and project plans inside and outside of Erasmus+. Additionally, it is being used for development of indicators, data collection methods and evaluation.

The wide use of the tool without modification indicates the tool is well targeted and developed for its audience, and is adaptable, transferrable and flexible in its uses. This suggests Impact+ has an ongoing place in their programme and project work within Europe and domestically. It is reported to compared favourably with other more recognised methodologies, and fills a niche in the market for impact measurement tools.

The tool is valuable and valued and is being used and circulated widely, and the community of use may continue to grow organically. Alternatively, it may that for embedding of Impact+ to continue, a structured longer term plan for the tool's development is needed. It would be helpful for future research and discussion to take place around how this will happen.

1. Introduction

Erasmus+ is the EU programme for education, training, youth and sport. The Erasmus+ programme will run from 2014-2020 and supports activities in education, training, youth and sport across all sectors of lifelong learning including higher education, further education, adult education, schools and youth activities. Erasmus+ is managed in the UK by a partnership between the British Council and Ecorys UK, called the National Agency (NA). NAs in the UK and other participant countries support programme applicants and beneficiaries in a variety of ways.

Maximising the impact of the E+ programme and projects is a key aspect of the role of the NAs. The UK NA, in partnership with the Slovenian NA and with input from several other NAs, designed a set of support materials called the Impact+ Exercise to help the projects and their partnerships to identify and evidence the impact of their activities.

The resulting tool sets out a four stage model of measuring impact:

1. Exploring aims, identifying outcomes and impacts
2. Exploring indicators for outcomes and impacts
3. Exploring data sources and data collection
4. Bringing it all together.

A workshop guide was also produced to support the use of and further development of workshops on the use of Impact+. A video guide and translated versions of the materials are also available.

These Impact+ materials were tested with 25 beneficiaries during a workshop in May 2016 and a piece of follow up research was carried out with participants in May-June 2017. This research report made a number of recommendations which included:

1. Extending the workshop to ensure that attendees have sufficient time to understand the exercise fully and, importantly, to practice using it;
2. Offering follow-up support to workshop participants to help reinforce their learning;
3. One section of the workshop should focus on the flexibility inherent in the Exercise, providing practical examples of ways in which organisations have adapted the Exercise to suit their project;
4. Future workshops should 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. An introductory workshop session to define and briefly discuss the terms used in the Impact+ Exercise, alongside some additional materials to support this.
6. Participants should be provided with additional information and advice about ways of collecting data that more accurately helps evaluate impact; and about sources of data.

Of these recommendations 1, 3, 4 and 6 were implemented. Recommendation 2 was not due to resource implications. With regard to recommendation 5, workshop participants were provided with the materials in advance of the workshop and as these include definitions of the terms, a specific session was not included in the workshop.

In November-December 2017, two further workshops including the recommended changes ran, involving a total of 39 participants, including Vocational Education & Training (VET) and Adult Education (AE) projects. The workshops involved discussion and training on using Impact+ Exercise, and discussion of stakeholder maps to assess and increase project impacts. Workshops were conducted in English.

1.1 Research background

In April 2018 research was commissioned to assess the value of the training workshops provided to Impact+ training course participants, consider how the Impact + training and tools had impacted on participants working methods and the impact on Erasmus+ projects. In addition, this research was interested in how individual participants had used Impact+ within their Erasmus+ partnerships, but also how they may have used the materials from the training and the Impact+ tools in other contexts – such as other projects, or their mainstream day to day activities.

The research questions posed in the brief were:

1. Did the Impact+ workshop help individuals to identify and understand the impact of their Erasmus+ project?

2. Has their learning from the Impact+ workshop produced changes in the way the individual and / or their organisation approaches impact assessment?

A set of sub questions related to how the materials have been used within beneficiary organisations and partnerships, for what purpose, and with what outcomes:

- Did workshop participants use the Impact+ Exercise? If yes, was this on their Erasmus+ project, other projects or both? If no, why not?
- If the Impact+ Exercise was used, how was it used? With partners or without, at the start / end of the activities, as a one-off or a live exercise?
- What changes in project management or impact assessment have they made as a result of using the Impact+ Exercise? Are these limited to their Erasmus+ project? Have they applied these changes to other activities?
- What data collection methods, data sources and analysis techniques did they use?
- 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?

1.2 Report structure
This report sets out the findings of the research, and is laid out as follows:

- Chapter 2 covers the research methodology
- Chapter 3 discusses the research findings
- Chapter 4 contains the conclusions and recommendations
- Annex A: Research tools
- Annex B: Case studies of how Impact+ has been used in various organisations and partnerships.

2. Methodology

2.1 Research set up and ethics

A strategy for contacting interviewees who had attended the training sessions was developed in conjunction with the UK Erasmus+ National Agency, ensuring that we remained within current data protection regulations. Initial contact with all the attendees of the training was made by the Erasmus+ NA that holds all the contact data for the attendees. Attendees were asked if they would accept being involved in the research, and reminded them that this was something referred to during the introduction to the training. If they did not opt out of the research at this point, the research team sent an introductory email, which outlined the purpose of the research interview, arrangements and timing of the research. This also offered an option to book an interview with the research team through an online booking system. This effectively offered them the option to opt in or choose not to participate.

Three follow-up calls or emails were sent to remind the potential interviewees to book an interview. A small number did choose to opt out by directly informing the research team of this decision, whilst a further group did not book interviews through the online system, effectively opting out. During the follow-up phone conversations a small number stated that they had not got the time within the timescale of the research to take part. The preamble to the interview itself included a further reaffirmation of consent to interview and be recorded, as well as offering anonymity (unless they were later to be chosen as a case study).

2.2 Interview process

The research used one-to-one telephone or Skype interviews with individuals who attended the Impact+ workshops. One-to-one telephone interviews with those who attended the Impact+ Exercise workshops were identified as the most appropriate means of collecting qualitative and quantitative data. The format of the topic guides allowed for exploration and probing of open-ended questions. The interviews typically lasted 30-40 minutes.

The research utilised 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 qualitative data. An abbreviated version of the questions posed to interviewees was sent in advance to participants. Comments from the UK Erasmus+ National Agency were taken into consideration when drafting the topic guide.

Interviews were recorded and transcribed onto an initial analysis framework. Direct quotations were drawn from the recordings to illustrate and expand upon the findings. These were coded to retain anonymity. Secondary analysis connected and interrelated data, to enable categorisation and identification of patterns and themes emerging. Given that this is a relatively small sample, this process was carried out manually by the research team members. This was reviewed alongside the quantitative data to form the basis of the research findings.

2.3 Topic guide

A copy of the interview topic guide is available in Annex A. Key points in the interview guide included coded and open questions covering:

- Whether they have used Impact+ in any way since the training, and if not explore why, plus any plans to use it in future.
- How many of the projects have used the Impact+ exercise, in what ways, and how this has affected their project's existing impact measures and evaluation plans.

- The types of activities instigated as a result of the exercise, from wider dissemination to research and evaluation plans, and how this relates to their wider organisation.
- Any materials produced within the project as a result of the training (to be collected with permission for reporting purposes).
- The influence the Impact+ Exercise has had on their wider partnership, and in what ways.
- Any thoughts or recommendations on the timing or content of the training materials, or further development of the Impact+ content for the future.

2.4 Case studies

Case studies have been used to provide additional insights into the different ways that Impact+ was being used. Potential case studies were identified during interviews that highlighted specific approaches to the Impact+ Exercise. A shortlist was drawn up of potential case studies and agreed with the Erasmus+ National Agency. A second set of interviews were carried out were required to provide more detailed information on individual and organisational approaches. These interviews were either with the lead project officer or with those individuals who had been trained in, or used, Impact+ as a result of being trained or briefed by the original attendee of the training. Semi-structured questionnaires were again used to collect qualitative and quantitative data from interviewees. The topic guides are included at Annex B.

There were a number of criteria used to select the case studies, which included:

- A mix of AE and VET projects
- Representation of projects from across UK / non-UK project participants
- Those who had project partner(s) using Impact+ or who have been trained in using Impact+
- Had shared Impact+ within their own organisation on projects or proposals or other internal processes
- Had developed their own materials related to Impact+
- They were willing to have their details disseminated more widely.

2.5 Desk based research

The team undertook desk based research to familiarise themselves with the Impact+ tools and the training materials from the workshop days so that they were fully acquainted with them in advance of discussions with projects.

The team also reviewed project websites for additional information on the aims, objectives and activities in advance or after the interviews. This was helpful where the project aims were complex or there were specific cultural aspects to the project which required further explanation.

2.6 The sample

Of the 36 potential interviewees who attended training sessions, 20 interviews were achieved. In addition a small number of interviews were completed with individuals to support the case studies that had not attended the training in Birmingham.

The mix of countries from which the interviewees were drawn were as follows: 5 from the UK, 3 Hungary, 2 Slovakia, 2 Italy, 1 each from Croatia, Iceland, Sweden, Estonia, Spain, Ireland, Germany, Netherlands. The project types were weighted slightly towards Adult Education, with 12 AE projects and 8 VET.

There were a wide range of promoting organisations represented, including: private enterprises, government departments, arms-length public services, Non-Governmental Organisations, Trade Unions/Social Partners, universities and industry/sector related bodies. In terms of their work, there was a cross section of IT companies, training agencies, health and social care organisations, consultancies, social work organisations,

employment agencies, arts and cultural bodies, industry bodies, expert groups and academic institutes and foundations.

The overarching objectives of the range of different projects interviewed were very widely varied, representing a cross section of typical Erasmus+ projects: increasing the take up of physical exercise to improve health wellbeing; improving basic literacy, numeracy and digital skills; increasing performance arts in rural areas; increasing access to the arts; and training in the safe treatment of bees.

Between 3-10 was the range of partner organisations the lead organisations were working with to deliver their Erasmus + project. Many with a mix of different types of organisations across the public, private and NGO sectors.

Five out of the 20 interviewed indicated that they had an external evaluator for their Erasmus + Project. Three referred to a specific partner of the project that had responsibility for evaluating the project. Of these all who had an external evaluator or evaluation partner were using Impact+ or were intending to use it.

Six of the interviewees stated that they did not have an evaluation partner and were also not using Impact+. Six interviewees stated that they had no evaluation plans in place prior to the training workshop, but would be using Impact+ going forward.

3. Findings

3.1 The workshop content and delivery

The Impact+ workshops took place in November and December 2017 in Birmingham UK. The agenda covered two days, starting at 10.30 am on day 1 and finishing at 12.30pm on day 2.

The day 1 agenda included:
- Impact and outcomes – definitions and introduction to the tool
- Indicators and data sources using a case study
- What makes a good indicator

The day 2 agenda included:
- Identifying and targeting stakeholders for impact part 1 - mapping
- Identifying and targeting stakeholders for impact part 2 – timing stakeholder actions
- A round up Q&A.

A fictional case study was used within each group to enable the delegates to work through an example across the two days.

3.2 The workshop value to participants

There was a wide variation in the existing knowledge of training participants, which meant that what they took from the training varied widely.   There were brand new project managers that attended the training alongside project promoters with more than 20 live projects, and who were very experienced in European projects.

Their motivation to attend varied widely too, from understanding the basics, through to attending with a view to becoming a centre of excellence within their larger organisation on European project evaluation. One organisation sent a delegate because they were already familiar with Impact+ and wanted to develop more expertise in using it.

Despite this wide variation of starting points and motivations, most interviewees referred to an increase in their understanding of impact assessment and project evaluation processes, as well as the importance of assessing the impact of their project as a result of the training.

The majority of interviewees found the Impact+ Exercise workshops either useful or very useful, apart from one who said it was "*hard to say, as I have not used the tool yet*" (interviewee 18). This participant was not a project manager or co-ordinator however, and the others interviewed were all actively engaged as project managers or coordinators.

Comments from those new to impact measurement included: "*It was really helpful…as a new project manager I am not experienced (in evaluation methodology) and I did not know much about the first step*."(Interviewee 5); and, "*I didn't have a clue (about evaluation) before the training*." (Interviewee 4)

For those participants less experienced in impact assessment and evaluation methods the approach to the workshop and content materials provided a straightforward, simple, visual and structured way to engage with the different stages of impact assessment, making it easier to apply to their project. One interviewee who said she was quite new to European projects commented that the training helped her very much as it made her more conscious of "*all the things related to impact*". In particular, she needed support with project documentation which was not developed well within her project plan, and the training helped with this. (Interviewee 15)

For those more experienced it acted as a reinforcement and a confidence builder: "*It has slightly increased our knowledge but has increased our confidence because it has validated what we are already doing*." (Interviewee 7)

An increase in confidence for the individual attendee of the training was a recurrent theme, either in their knowledge about impact related terms and measures, or their ability to pass the information from the training and the tools on to others, or to increase their confidence in using tools to help them create meaningful indicators. For example, one interviewee said the workshop and related guidance gave him the confidence to take all the project partners through the exercise process, stimulate a discussion on process, and discuss suitable data sources. (Interviewee 12)

Another interviewee felt the training had clarified specific issues for him and built his confidence in specific tasks related to impact measures: *"It clarified outputs and outcomes and the difference. I know how to develop a set of indicators now."* (Interviewee 17)

3.3 The workshop content
The increase in knowledge and confidence expressed by the interviewees seemed largely related to how the training had been delivered to them.

There were a variety of very strong endorsements of the content and delivery of the training. For example: "*The training was really excellent, just right. I was able to copy exactly what I learned in using the tool. They are very, very good, and well done."* (Interviewee 9)

Several enjoyed the participatory nature of the workshop and the interaction with other project leads which gave them a much broader view of how others were using impact measures and with whom they could exchange ideas. For example, one smaller organisation stated that, "*As a small organisation it was helpful to interact with other organisations and share experience, knowledge and understanding including doing practical case exercises and discussing with other participants*." (Interviewee 6)

The training materials and approach to the workshop prompted discussion and the exchange of thinking and ideas on measuring impact from different perspectives. One delegate commented that, "*It helps to understand the bigger picture in relation to the project's impact and how it will impact on stakeholders*." (Interviewee 2)

The training was paced well for the majority of participants, and in such a way that the knowledge of using the tool built through the various stages of developing the exercise (stages 1-4). One attendee commented: "*The workshop was very useful in helping to go through the different steps and strengthened my understanding of how I could use it*." (Interviewee 17)

The very practical nature of the training, that allowed an in-depth look at the topic of impact measurement in a European project was definitely appreciated, as summed up by one of the attendees: "*It was a time to consider and was fully immersive. It looked at the nuts and bolts.*" (Interviewee 14)

Some found specific aspects of the training more helpful than others, for example: "*The depth of the second day was very helpful to think about how to identify stakeholders, mapping, and identifying different levels*." (Interviewee 2)

There were a number of suggestions from delegates on how the training could be enhanced, although overall the training and the trainer were very highly valued by the attendees. Indeed, a number commented specifically on how helpful the trainer was. The fact that follow up research has been put in place also showed a commitment to professionalism, development of the materials and also assessment of the impact of the training, reinforcing the value of impact measurement. For example: *"I enjoyed the training a lot. It was professional and practical. The workshop leader was very helpful. Follow up of training to this depth is not very common and I appreciate the fact that we are doing this research." (*Interviewee 15)

A number of interviewees felt that working through case examples was a valuable exercise, and would have liked more time to work through all the stages in more detail. Some expressed a desire for 'real' case studies, and opportunities to use live cases from their own experience, and also requested more time on the case studies: **"***It was a great training, I don't have any criticisms. Maybe on the last day for the 3 steps, I would like more time to do that. I wanted to make my own actions concrete, so they we plan for themselves."* (Interviewee 19)

One interviewee requested more time on the indicators: "*It would be very nice to spend more time on indicators. The training gave half an hour …It gave a good definition of indicators and a good introduction, but I would like the training to go further. It would be nice if we could use an exercise or example of using Impact+ within and application process, and see a worked through example, as well as doing an exercise to help with this.*" (Interviewee 16)

There was also a request for some time to consider their own project specific issues and some help with developing their data sources and indicators for their project(s), possibly through peer support, and action planning their own impact measurement during the two days. For example: "*The workshop was a great stimulus to look at how to measure the impact of the project and working with others from different projects was very helpful… I wanted some time to make our own actions concrete, so we can plan for ourselves.*" (Interviewee 19)

Another interviewee (interviewee 13) would have liked to have some support in how they could measure other outcomes from the project that were not necessarily part of the potential outcomes envisaged, and how you look at measuring the impact of indirect outcomes for example training a trainer and then seeing the impact of the trainer training on the students they are training.

In practical terms there were comments about the depth and timings which did not have a single clear message across delegates – some said the first day was too slow – these tended to be the more experienced delegates – and those who thought the second day was slow. One of the more experienced trainee suggested that a train the trainers higher level option was introduced in future to maximise what more experienced delegates could get from the training and tool usage – possibly as a one day course.

Again, at a very specific level of content of the workshop, several delegates felt that the term outcome and indicator were conflated in certain parts of the course. Whist there is a clear distinction made between these in other parts of the training, interviewees would like to see this to be clearer across all materials in future courses.

3.4 Effect of Impact+ on project delivery

Over half of the interviewees had made some level of changes to the way their Erasmus+ project was delivered due to the Impact+ resources. A recurrent theme was how the training and the resources helped introduce a more structured approach to measuring impact both for projects that had a plan in place for their project evaluation already, and those which were still forming their plans.

For example, on interviewee drew attention to how they had both introduced more structure as a result of using the tool, and also addressed how their indicators should be structured to deliver a better project plan: "*It was very interesting for me (to see) the model and approach. Previously our approach was less structured, and it helped me develop more meaningful indicators.*" (Interviewee 16)

Several interviewees have taken a more formalised or focussed approach to indicators, data sources and collection to measure impact either as the lead partner or across the partnership as a result of using the tool. This applied both for project initiation, as well as for projects that were nearing completion: "*It gave me a chance to think about the steps required to identify what indicators could be measured that would give some meaningful value to the impact of our Erasmus+ project.*" (Interviewee 14)

Another participant commented that it helped him think about the different target groups who would receive the evidence of project impact. "*The stakeholders are a central aspect of the training, and this made me think about this from the (project) start*". (Interviewee 10)

A recurrent subject throughout the interviews was how problematic it can be to prove or demonstrate the impact of a project, both at application/proposal stage and throughout the reporting process: "*Impact is very hard to prove, but with this method it helps us plan gathering evidence, making them (colleagues running European projects) more able to provide a report on impact.*" (Interviewee 12)

For one interviewee it had provided a way to harness the motivation of the project team members on what the project intended to achieve, providing greater inspiration to succeed. The interviewee commented that Impact+ was helpful in, "*creating an ambition to increase the potential impact of the project.*" (Interviewee 12) This theme of overall improvement to the project delivery as a result of Impact+ was echoed by another interviewee who stated: "*It changed our thinking about results, and thinking about the changes our project must bring.*" (Interviewee 19)

For some interviewees it had helped them conceptualise the change they want to bring about and how they measure this. One participant commented that it helped the team think differently about the end point of the project, and rather than just focussing on dissemination of the project results, to focus on demonstrating impact: "*It made us focus on what we are disseminating and why we are disseminating it. Impact is the end result of disseminating. We are developing a strategy to more efficiently disseminate the impact for better results.*"(Interviewee 8)

3.5 Changes to evaluation approaches

Over half of the interviewees were adjusting their professional approach to evaluation as a result of the Impact+ tool. Eight of the interviewees stated that they did not previously use any other impact assessment, evaluation tools or approaches in their projects. Several indicated previously using KPIs or logical framework, while others stated they used customer survey or quality assurance questionnaires with beneficiaries. Five out of the 20 interviewed indicated that they had an external evaluator for their Erasmus + Project. Three stated they had a specific partner that had responsibility for evaluating the project.

Projects were, in cases where they had no existing evaluation plan, building Impact+ ways of working into their activities from the outset. One interviewee commented that it had helped them in thinking evaluation through "*from beginning to end*". (Interviewee 9) Another commented that previously her approach had been less structured in the past, and it helped her develop more meaningful indicators to help develop her structure for evaluation. (Interviewee 15)

Where they had an existing evaluator in place, projects were able to integrate Impact+ into the approach. For example, one interviewee clearly indicated that the tool was complementary to their activities. The project team carried out both external and internal evaluation of projects, and they felt Impact+ is particularly helpful for internal activity. The project coordinator was to brief their evaluation partner on the tool and its impact on their approach to support the overall evaluation package. (Interviewee 11)

Impact+ introduced a new approach to some interviewees who had an existing organisational evaluation method, particularly if it was not working for them. For example, one interviewee suggested that it would influence her way of doing things, as she had worked mainly with KPIs before. "*Through Impact+ the partnership can share a common approach. In the first moments of the project the brainstorming is very fruitful. In the past the partnerships have not had a common or structured approach, which Impact + offers. Partners can have confused ideas amongst the team without a common approach.*" (Interviewee 16)

One interviewee compared the tool favourably in comparison to Social Return on Investment (SROI), but another wanted more links to be made to logic models which they were used to: "*…a bit more connection to logic models would have helped to explain how the tool fits, plus more examples.*" (Interviewees 4 and 20)

3.6 Data collection methods

A number of data collection and impact measures were already in use by the projects. These include the "OK R" method which looks at objectives and key results; training questionnaires; feedback from partners; data capture platforms; film to document participation feedback in training and photos; interviews to gather participant views and perceptions; use of KPIs, SROI and logic models.

For some it has expanded their thinking and approach on methods to collect data. One interviewee commented that they struggled with measuring impact, "*despite decades of experience. Impact has often felt too abstract a concept and so was overwhelming. This tool makes it really easy to figure it all through. It helps debunk the myths on data collection. There are lots of quick wins to help measure impact.*" (Interviewee 14)

In various cases where there was an evaluation partner, there clearly has been some exchange of thinking around how Impact+ could be integrated into the data collection process. One interviewee referred to questionnaires being what they have always used, and that they will use them again, but after understanding Impact+, they will look in more detail at the questions, being clearer about the target groups they want to reach and the information they will collect. (Interviewee 14)

Where interviewees had taken Impact+ to a partnership meeting, the issue of data collection had been a key part of the discussion. This aspect had been carried forward to a further meeting in a number of cases, as they consider the best places to get impact data. This was clearly one of the more challenging aspects of utilising the tool, but had provided, as one delegate put it "food for thought" – to challenge the traditional methods of data collection and look at different and potentially more effective methods of collecting and utilising data. (Interviewee 14)

One interviewee suggested that in the past her organisation had used performance measures, output reports, and intellectual papers which did not actually measure impact. With the use of Impact+ she was hopeful that a different process for generating data could be utilised that actually did demonstrate impact, which would help her organisation gain more credibility and win more proposals in future. (Interviewee 19)

Soft outcomes can be an area that project managers struggle to capture, as noted by one of the interviewees. They commented that they have tended in the past to use quantitative data and usually survey all participants, but don't capture the distance travelled so easily. This project was committed to using the tool to more effectively capture feedback through the whole project lifetime. (Interviewee 12)

3.7 The Impact+ tool and its uses
The majority of the interviewees stated they would recommend the Impact+ tool more widely beyond their own organisation and the partners of the current Erasmus+ project. A number had already recommended it to colleagues, who had then attended training that was being cascaded by delegates from the two workshops through the various project partnership meetings. Another interviewee had endorsed the training and method at a good practice seminar held by her NA.

One interviewee said they found the method to be "*beautifully designed and developed*". She indicated that it was a very beneficial experience to be trained and to use it, and looks forward to more opportunities to use it in the future. (Interviewee 5)

A number of key points came up regarding the tool, in that it was ready made, and could be used directly without any adaptation. Most projects described how they have used the materials exactly as given. The materials were seen as quite intuitive to use by a number of interviewees, and therefore did not need any further adaptation to use them, although one project had adapted the materials slightly so that they could be included in large chart format for partners to work through in groups but had not adjusted the content.

This complete nature if the tool was appreciated by interviewees, as it saved them time searching for a suitable methodology. For example, one interviewee commented that, "*It's useful to have a set of tools, so they don't have to come up with these from scratch. The partners and co-ordinators are not always aware of what evaluation materials are available and this helps them with something off the shelf*." (Interviewee 10)

Another interviewee summarised why the tool could be used without any necessary adaptation for different contexts when he commented that, "*the training provided a tool that is so transferrable*". (Interviewee 14)

The tool itself was found to be very well structured, enabling the project team to develop a process to work through for the duration of the project: "*It is a really effective approach. It is structured and logical, and allows projects to structure their work on impact and are able to follow this through the project lifespan*." (Interviewee 12)

A number of the respondents referred to the uncomplicated nature of the tools. For example: "*The four fields are very easy to understand and use. The fields help to measure impact in a more structured way than in the past. It is very visual, it doesn't have complicated numbers to work through like, say, SROI.*" (Interviewee 20)

A number of interviewees also commented on the structured approach it allowed them to develop: "*It has helped us think through the whole process of measuring impact in a project in a structured way so partners have it in mind from the start of a project now. It has helped us stay focussed on Impact throughout the project.*" (Interviewee 9)

Even for those who were more experienced in the use of impact measurement methods also found it a simple but effective way of measuring project progress and outcomes: "*We were more 'laissez faire' in the past. We were not used to using a toolkit to do this, so it's helped us formalise the process.*" (Interviewee 8)

Four interviewees did raise some difficulties in either using the Impact+ tool. Examples were how to apply the data and information already collected by their project to the scoring system; adapting the terminology for the purpose of their project; guidance/advice on valid data to measure the indicators identified; a perception that the training and tool conflated the terms outcomes and impact creating confusion. Comments related to this included:

- "*We needed additional assistance with the implementation side of how to use what data and information that has been collected.*" (Interviewee 1)

- "*(We have) some have difficulty with the scoring system, and how to produce the final result.*" (Interviewee 1)

- "*The focus on learners as a group doesn't always fit (i.e. business people are not learners as such). It took time to adapt the terminology.*" (Interviewee 2)

- "*(We) found it a challenge to grasp the difference between indicators and data sources and exact and valid data. Also, how to look at direct and indirect impact in the context of a theatre based project.*" (Interviewee 6)

3.8 Working with partners

Nearly six months after the Impact+ Exercise workshop, 8 of the 20 projects had introduced partners to the Impact+ exercise. The majority of those that had not yet introduced the materials to partners were planning to in a future meeting, or in one case in their final meeting to plan the last stages and reporting for the project. Only one interviewee suggested they would not use it, because of the nature of the team working on project being too high level to receive training on impact measurement.

The majority of interviewees had Erasmus+ projects that had been funded from Autumn 2017, so the training was delivered at as time that allowed it to be integrated into the project set up phase. (Although one project stated that the training happened after the first partnership meeting). A number of the interviewees had taken the initiative to define time within the first partnership meeting to go through the Impact+ materials, condensing them into a slot of 2-3 hours generally. In these cases, the tool was used strategically to plan their approach to impact measurement with partners. It aided agreement in the areas they want to impact, indicators and data sources.

The method and approach of the tool has aided and strengthened partnership working in that it has prompted discussion on a shared understanding of impact and measuring impact and outcomes, and not just outputs. The tool has also facilitated agreements on indicators and sources of data because the framework of the tool has enabled a straightforward/simple structured approach to looking at impact.

For most of the interviewees the outcome of introducing the Impact + Exercise was too early to state, but in a number of cases the response from partner organisations had been positive. The interviewees tended to state

that the tool had helped reach a shared understanding of their common goals, a joint sense of purpose in data collection methods, and a shared approach to assessing the impact of their project.

One interviewee described the process of utilising the materials with their partners at the outset, and then using it to track through their project, revisiting it at each meeting: "*We built it into the kick of meeting with partners. We printed the impact sheet (with the four boxes) and worked through the exercise with partners. It guided discussions around areas of impact, what we would be tracking and our data sources. It has helped inform how we will set baseline questions from the early stages, rather than waiting (as we would normally do). It has been used at the start of the project and we will be following through on elements. We would have liked to use it at the development stage, but did not due to timing*." (Interviewee 2)

Another project had only used it with partners from their own country, not in the full international partnership. They considered, like the others cited, that it had, "*sharpened the project, and got partners aligned to (common) goals*." (Interviewee 19)

Some participants used particular stages with partners to work through and focus down on indicators to measure outcomes and the sources of data and methods. "*We used the Impact exercise with the EU partners for this project. Stages 2 and 3 have been used in partner meetings to identify the indicators to measure impact and outcomes and also the sources of data and methods*." (Interviewee 17)

Some partnerships had used the tool on projects already underway, or on projects that were being completed, showing the tools overall adaptability.

Where the tool had not been used in partnership meetings, other interviewees had shared links to the video and the materials instead, or as a prelude to a fuller slot at a partnership meeting. In one case when the link to the materials and video was shared, they decided it should be spread across two meetings as there was too much for one meeting. (Interviewee 10)

Another described that although she had not used it specifically as a workshop with partners, it had affected her thinking on indicators and had spurred her to try to develop her partners approach through their meetings and joint activities to thinking about impact more. This interviewee considered that the approach to evaluation being taken by their evaluation partner needed modification because it was based on individual discussions with delivery partners rather than an overall structured approach, such as that offered by Impact+. (Interviewee 16)

Feedback from partners who had been introduced to the tool showed that it had been welcomed in many cases. For example, one interviewee commented that: "*They found it useful, and have developed a joint strategy for measuring impact as a result, across the whole project. Partners may be used to business or other processes but where they are new to European funded projects and their knowledge of this is lower, the Impact+ tool helps you get across as the lead project what you need to do and why*." (Interviewee 8)

Another interviewee commented that: "*Some use other methods and prefer them, but the feedback was very positive. Some had heard of it before. They all felt it was an interesting approach and …said they would probably find it useful in their organisations as a whole*." (Interviewee 9)

Another stated that, "*Feedback from partners was very positive indeed. The training (for partners) was very successful*." (Interviewee 11)

3.9 Use of Impact+ in other contexts
Eight of the 20 interviewees have used the Impact+ exercise for other projects or activities. Seven of the 20 interviewees have used the Impact+ exercise with other colleagues within their organisation that were not directly involved in the current Erasmus+ project. For example, one interviewee had indicated that they had used it as part of their high level strategic management planning process. (Interviewee 1)

A few of the interviewees have already begun to customise the exercise materials format (not content) for use with their team members and more widely in their organisation illustrating the adaptability of the tool to meet different organisational requirements.

Others had used it in team training to increase understanding of impact measurement within their department or organisation (Interviewees 11 and 14).

The majority of the interviewees were already using the impact+ exercise to develop project applications or were planning to do so, and not just for Erasmus+ future projects but for other funding programmes reflecting the flexibility of the tool in its application in the different stages of project development.

One interviewee outlined how they had been using it in bids as a companion tool to structure their answers and also to support the development of the right indicators. Another project had utilised the tool before the workshops took place to support a bidding process, as she was aware of its value before attending the training. (Interviewees 14 and 17)

A further interviewee was mentoring other colleagues within his organisation to help them develop bids for European funds. He believes this has been very beneficial: *"Professors have an idea for a project, but they forget they have end their project with showing impact. Forty per cent of the assessment process is based on impact measures, and when the professors understand this everything changes. Professors typically say they feel alone when making their applications, and providing one professor with these materials and helping her through the workshop exercise has enabled her to feel confident in completing the application."* (Interviewee 12)

One interviewee had used it for preparing for evaluation of 5-year service plans for domestic services social services. The training had been very timely for him, as the service plans specifications had arrived soon after the training. The service plans required impact measures for the first time, enabling him to use his knowledge to develop the service specifications more effectively. (Interviewee 20)

3.10 Use of the video and translated materials
Three of the 20 interviewed indicated that they had used the video, which had been a useful method to initially introduce the concept of impact assessment and the exercise to others as well as acting as a refresher to the workshop participant.

Those that have used the translated materials found it useful to share with partner organisations and helped them follow the introduction of Impact+ more easily. However, the majority of those interviewed, that were using the workshop exercise material, indicated that they were using the English version as this was the language they were working in with their partner organisations.

Eight out of the 20 interviewees did not encounter any difficulties in either using the video or translated materials to introduce colleagues or partner organisations to the Impact+ Exercise.

3.11 The note on the research
The research process following the training some six to eight months later most likely prompted the memories of delegates around the workshop. It enabled them to review the materials again, and review what they had done with the tool since the training. In that sense it has actually influenced the process of embedding and disseminating the tool, and reinforced the importance of impact measurement in Erasmus+ projects. One delegate stated that she was very appreciative of the research being carried out, as it showed the training was being taken seriously and properly followed through – by assessing the impact of the impact training itself! Other interviewees looked forward to further enhancements of the tool after the research, indicating their commitment to helping the exercise to grow and develop.

4. Conclusions and recommendations

The conclusions and recommendations are based on suggestions from delegates, as well as some more strategic recommendations from the research team. The recommendations are divided into 'quick wins' and those which have more significant resource implications and relate to medium and longer term potential of the Impact+ Exercise.

4.1 Conclusions

The main conclusions from the research are determined by the key research questions:

1. Did the Impact+ workshop help individuals to identify and understand the impact of their Erasmus+ project?

2. Has their learning from the Impact+ workshop produced changes in the way the individual and / or their organisation approaches impact assessment?

The conclusions are arranged below around each research question.

1. Did the Impact+ workshop help individuals to identify and understand the impact of their Erasmus+ project?

In relation to whether the Impact+ workshop help individuals to identify and understand the impact of their Erasmus+ project, the Impact+ workshop and materials certainly have influenced a number of the individuals trained, and the processes of collaboration between and within partnerships. Project methodologies and processes have also been influenced by the workshop and materials.

The workshop
The workshop itself was clearly **key to increasing participant knowledge around impact measurement**, whatever their previous level of experience was. There were **differences in the way delegates experienced the workshop** and subsequently implemented the tool, however.

For novice project leaders and smaller organisations or individuals within larger organisations who were feeling isolated from anyone with strong European project management experience, the **joining together to experience the training, discuss with colleagues and work through problems and issues together was of high value to them**. In this case it **gave confidence to them as less experienced project coordinators** to understand their stakeholders, develop appropriate indicators and plan impact measurement.

More experienced delegates also gave a very positive evaluation of the training and its **ability to add value to their existing knowledge and enable them to train others**. They tended to attend the workshop with this as a goal. A number of them went on to become an **advocate of Impact+ within their organisation and their partnership,** with the **confidence to cascade** the methodology.

The tool and materials
Delegates stated that impact measures and reporting can be unnecessarily over complicated. **The simplicity of the tool, its design, its clear steps and its accessible materials was definitely valued**. Delegates also understood that the apparent simplicity of the tool overlays the fact that **it neatly covers a complex and generally poorly understood area of project management.**

The **tool is reported as lending itself particularly well to partnership working,** and has provided **a mechanism to reach a consensual decision on indicators, data measurement and reporting of impact within partnerships**. Hence, **the process of using the tool is as important as the outcome of using the tool**.

A number also commented on how the **tool focussed them on the end point of the project and exactly what they were aiming to achieve**, keeping them focussed on this rather than the process of implementation itself. The term dissemination was discussed by a number of the interviewees as no longer being their primary activity in completing a project, but rather they were **focussing on what they will be disseminating, which is their impact.**

Outcomes
At the point of the research being carried out, **none of the projects had utilised the tool throughout a project cycle,** and it was reported to be 'early days' for many of them. Nevertheless the process of influencing project design from the outset was underway, and comments from interviewees indicated that they would **revisit the detail of the Impact+ exercise with partners throughout the project** through their partnership meetings.

The tool is operating at several levels including: **enhancing the process of partnership meetings with a collaborative activity**; **leading to more effective and thorough thinking on indicators and data collection methods;** and **providing a mechanism to reach a consensus on project goals** that will **demonstrate impact to stakeholders.**

2. Has their learning from the Impact+ workshop produced changes in the way the individual and / or their organisation approaches impact assessment?

In relation to the second research question – whether their learning from the Impact+ workshop produced changes in the way the individual and / or their organisation approaches impact assessment - at an individual level, **the impact of Impact+ on delegates appears to vary depending on their previous knowledge and experience.**

Cascading Impact+ to others
For those with **less experience** the workshop influenced their confidence with the methods, but **a number appeared to need additional support to move their use of Impact+ on** and embed it within their project structures. We suggest below a number of measures to help support them with this process.

For those with **more experience**, and the ability to compare and draw on other approaches to impact measurement, the **Impact+ workshop and guidance had helped them utilise the materials and quickly introduce them to others**. These delegates had clearly found this a valuable way to engage their teams and specific colleagues. The training materials and tool had been used in individual coaching sessions as well. Even so, some of this group suggested they would have **liked a more focussed and higher level workshop to directly support them in cascading their knowledge** and influence processes and methodologies in their organisations.

In both of these groups there were individuals who had not yet found time to introduce Impact+ to others, or who were making changes to the way they personally worked only.

A third group of just under half of the workshop attendees, that is those who did not agree to be interviewed, may also need additional support to embed Impact+ in their organisation.

Influencing project activities
A number of interviewees were using the materials to guide and support them with project design, project implementation and project evaluation both for Erasmus+, and other programmes and projects. The **tool is seen as very useful in developing bids, contracting frameworks and project plans inside and outside of Erasmus**+, and applying the Impact+ process to development of indicators, data collection methods and evaluation of a wide variety of funded activities.

Wider use of Impact+
Delegates wide use of the tool in other contexts than their Erasmus+ partnership, without any real modification of content, indicates the tool has found its mark in terms of its targeting. The **tool is clearly adaptable, transferrable and highly flexible in its uses.** It introduces a structure into project proposals and project planning that delegates felt was too often lacking.

The **more experienced delegates** suggested Impact+ has a **strong and ongoing place in their programme and project work** – both within Europe and domestically. They suggested it compared favourably with other more recognised methodologies and fills a niche in the market for simple tools to support the complex task of impact measurement. This raises the **question of the longer term development of the Impact+ project as a**

whole, as the funding for Impact+ will finish in 2019. This has led us to make some recommendations around the sustainability of the tool and workshops longer term.

Sustainability and building the Impact+ community
The key research questions posed are around how to effectively embed Impact+ into project processes to better support impact measurement and reporting, and the role of the workshop and associated materials in enabling this to happen. However, the research does beg the further question that, although it is very clear that the tool is valuable and valued and that it is being used and circulated widely, it is **unclear how widely or how well the tool is being used outside of the cohort trained and interviewed** – that is, the 20 individuals within this research cohort.

The majority of evaluation methodologies and tools have a sustained community of practice associated to them with accreditation of training and certification of usage. Impact+ does not have these in place, because the assumption is that the Impact+ community will grow organically from those who have been trained in its usage implementing it and also training others. This may be an effective outcome of the Impact+ funding. **It may be the case though that for embedding of Impact+ to continue and grow, there needs to be a more structured longer term plan for the tool's development across the E+ community.** The workshop delivery has largely taken place through the UK National Agency and the funding for further training and development finishes in 2019.

In light of this, it would be helpful for future research and discussion to take place around how other NAs see their role in funding and supporting their own Erasmus+ project leaders in measuring impact going forward, once the UK based workshops finish. This applies to those already trained who want to become more expert in assessing impact using the tool, as well as those who have not yet been trained in using the tool. For example, are National Agencies prepared to have a contact point for Impact+ internally to support ongoing development of the tool? **An assessment of the feasibility of this could be included in a future research brief or taken forward through 6 monthly National Agency meetings.**

A further endorsement of Impact+ would also help in sustaining the Impact+ user community through some official reference to Impact+ within Erasmus+ programme guidance. This would officially recognise that the Impact+ tool has been developed in the intellectual commons of Erasmus+.

There is a demand and value in training those with more experience in terms of their confidence in becoming advocates of the tool, quickly implementing use of the tool inside Erasmus+ and elsewhere, and cascading the workshop to others. There is a question to be addressed at a strategic level regarding the most effective plan for the delivery of the final workshops. At least one training course focussed on training the trainer for the more experienced delegate who is in a position to influence others would support the continuing development of an Impact+ user group who can grow the use of the tool in different member states.

4.2 Recommendations

Quick wins
- **The materials for the training and the tool are reviewed to ensure impact and outcomes are not conflated.** The materials need a sense check to ensure that the materials are consistent and clear on definitions.
- **Application process to clarify how delegates will embed the tool after the workshop.** Delegates need to be clear in advance of attending that they will be in a position to take the training and the tool forward within their partnership – so avoiding, where possible, project workers attending without any influence over project management. The application process could be enhanced to ensure this is the case – for example by asking them to outline how they will be using the tool going forward after the training.
- **Enhance the engagement with the specific needs of each delegate.** This could be done in a variety of ways – collecting their issues during the application process and taking an hour of the training to consider these as a group. Peer to peer 'workshopping' of issues which would enable more experienced delegates to help those with less experience develop their ideas and plans. This would

require an hour of additional training time being found across the two days. This seems feasible given that some delegates felt that the first day was slow in parts. Alternatively, the training could end later than the 12 noon end time on the second day, or start earlier on the first day. A post it wall of issues could be set up on the first day and addressed as examples by the trainer or put into a workshop scenario. A further option would be a surgery session during breaks or at the end of formal proceedings, potentially with an additional member of staff to support the delivery of these. It is unlikely that all would take up this option, so the resourcing of this should be considered feasible.

- **Enhance the momentum towards action after the training is completed through action planning.** We suggest that each attendee spends some time developing a short three-point action plan for their own project within the final day of the training. That is, their top three actions for when they get back to their project are developed on the last day of the training, and the trainer (or the research team – see below) then follows these up after the course is completed. This would act as a reminder of the dynamic feeling they had when they were trained, and act as a stimulus to action. The video link could also be resent at this point as a reminder of the tool's uses.

Medium term implementation
- **Supplement the video.** The video is an effective but short run through of the tool. Additional value to supplement the video could be gained through the development of a step by step guide to using Impact+, with some worked through demonstrations, testimonials on using the tool within some case studies. Simple tools such as Prezi or an infographic could support this process. YouTube is also a free resource, and simple talk throughs to supplement the video are cheap to produce and disseminate, and could be a helpful addition to the suite of materials.
- **Communities of Practice**. Ongoing online Communities of Practice would be a strong addition to the training – for example through the EPALE website. These are peer led, and could be led by EPALE champions, for example. This would be an opportunity to bring together delegates across all the workshops and continue the discussions around using the tool, particularly supporting the less confident or experienced delegates, as well as those more advanced in using the tool with those less so.
- **Development of a 'top tips guide' on using Impact+.** This could be complied from delegates, covering areas such as: how I have used the tool; how I have marketed the tool to others; overcoming obstacles and resistance; success stories etc. The set-up of communities of practice on EPALE could be both a source for materials as well as a means for dissemination of these materials.

Longer term sustainability
- **Research/discussion around the National Agency's role in supporting the Impact+ community of practice grow and develop.** As funding for the workshops and tool development finishes, the final tranche of research into Impact+ should review the need and feasibility of National Agencies taking a future role in taking Impact+ forward.
- **Research into the effectiveness of Impact+.** Research around Impact+ to date has focused on the outcomes and impact of the workshop and the usage of the toolkit. By carrying out research and implementing change as a result, the NA indicates to others that it is a learning organisation. We recommend that follow up research is continued after future workshops. Two potential models for this are an action learning based approach, where the researchers are embedded into the delivery model and test as they go (supporting the development and follow up on action planning by projects); or alternatively adopt a more critical friend approach, attending the training and providing a sounding board for future developments and support with sustainability.
- **Training trainers.** The training has trained a number of professionals at all levels of knowledge and experience regarding impact measurement. In terms of sustainability, a final round of trainer training taking in as many National Agencies as possible would support the growth of a more sustainable community of practice around Impact+.

Annex A: Topic Guides

TOPIC GUIDE Impact+ 2018 (workshop participants)

Introduction
Hello. I am [………………..] and I'm calling from the Impact+ Research Team.

The interview will last about 40-50 minutes. Is it still OK to proceed with the interview?

For practical reasons, we would like to record the interview. Is this ok with you? Anything you say will be anonymous, unless you agree otherwise, and we will destroy recordings when the research is complete. Remember participation is voluntary and you can decide to stop the interview at any time.

Are you ready to begin?

Just to have a bit of a background, I would like you to briefly describe your Erasmus+ project
- Are they Adult Ed or Vocational Ed Training (AE or VET)?
- What sector – third/voluntary association/not for profit, academic, educational?
- Participants?
- What is their overarching objective?
- How many partners in which type of organisations?
- Have you got an external evaluator?

Questions
Now that I understand your project better, I would like you to think about the Impact+ Exercise workshop you attended in NOVEMBER /DECEMBER [INTERVIEWER TO SELECT APPROPRIATE MONTH] and the lessons that you took away from it.

The workshop
1. Was the workshop helpful in helping you to consider the impact of your Erasmus+ project? *(Check what is their spontaneous answer to this, as it's the most likely to be accurate)*
Probe each answer
- **If yes how**
- **If no why**
- **If in some ways**:
  - *Has it increased their knowledge about evaluating project impact*
  - *Are they confident in using Impact+ now*
  - *Check if its influenced their thinking but not yet their actions*

Using Impact+
2a. Have you used the Impact+ Exercise or aspects of it to measure the impact of your Erasmus+ project since the training?
- Yes
- No (skip to 8)

2b. Could you describe how you have been using Impact+?
Prompts: *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?*

2c. Have you finished using the exercise or are you part way through?
- Complete/ Part way through
- How long has the exercise taken / expected to take?
- Were there any quick wins or early gains (check this for understanding)?

2d. In which project phases did you use it? Confirm their answer through prompts to the following:.
- 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

2e. Have you used the materials from the workshop directly?
- Yes - *all of them*
- Only some of them - *probe on which*
- No – *why not?*

Probe on: their relevance, usability etc

Ask specifically about the **video guide** for the Impact Exercise? How have you used this? How helpful has this been?

Ask specifically about the **translated materials** Which language have you used? How helpful was this translated material and in what ways?

2f. Did you produce any materials for the team/project about Impact+
- If yes, what are they?   How have you used them? Ask if we can see them
- If no move to the next question

2g. Which data collection methods/data sources have you used / are you using to evaluate the impact of your project?
How have you used them? How effective have they been?

Partners
3a. How experienced are your partners in using evaluation methodologies. Does experience vary between partners and how does this affect the project approach to impact/evaluation?

3b. Did you introduce your project partners to the Impact+ Exercise?
- Yes
- No
- Why - in either case

3c. How did you introduce the exercise to partners?

Prompts   - one or more of:
- Meeting
- Training
- Sharing materials
- Other

3c. How useful have partners found Impact+?
Probe on: how /if they are using it

Change resulting from Impact+
4a. 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 you have you done differently?
- No – Why not?
- *Ask specifically for changes in the way the activities were planned and delivered.*

4b. Have you changed your professional approach to evaluation as a result on Impact+ (if not covered in Q1)? How and how is this manifested?

Other projects/activities/services?
5. Are you using the Impact+ Exercise for other projects or activities you are delivering or have delivered?
Read out if its unclear what they are saying:
- Yes, for all our projects (what are they?)
- 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

Your wider organisation
6. Is the Impact+ Exercise used more widely in your organisation? (i.e. by other colleagues, at different departments, etc.)
- Yes – can you explain how it is being used:
- No

If yes, how did you introduce the exercise within your organisation/colleagues?

Prompts   - one or more of:
- Meeting
- Training
- Sharing materials
- Other

Any issues or changes
7. Have you encountered any difficulties when using the Impact+ Exercise?
- Yes – Could you describe what those were? How could it be improved? What wasn't clear? *(Ask in relation to the tool, workshop guide and the video)*
- No

Not using Impact+
Question 8: only for those who answer No at question 2.

8a. Why haven't you used the Impact+ Exercise to measure the impact of your project? *(which of the following best sums up your reason: read out responses to check which best summaries the answer)*
- 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)

8b. Does your organisation currently use any other impact assessment/evaluation tools or approaches to evaluate its impact?

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

(if no, why – especially if they have not been using the tool either?)

8c. Are you using an external evaluator, or conducting an internal evaluation?

If yes, where did they get them? Was the decision to appoint influenced by Impact+? Are they producing / have they produced any reports? Can these be shared?

Project applications

9a. Have you used Impact+ Exercise to develop project applications?

- Yes – Probe on which ones? What was the outcome? Did the exercise help?
- No

9b. Are you planning to use Impact+ Exercise to develop project applications in the future?

- Yes – Which ones? How
- No

Final questions

10a. Would you recommend / have you recommended it to others?

- Yes why
- No why

10b. We talked about things that you would change about the Exercise. Is there anything else that you would find useful to discuss about Impact+?

10c. 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 re-contacted to discuss this in more detail?

- Yes
- No

Ask if they would be interested in talking to us on a group video call.

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.

TOPIC GUIDE Impact+ 2018 (case study partners)

Introduction
Hello. I am [………………..] and I'm calling from the Impact+Research Team.

X has put me in touch with you so that I can talk to you about Impact+, the Impact Measurement Tool that X introduced you to.

The interview will last about 15 minutes. Is it still OK to proceed with the interview?
For practical reasons, we would like to record the interview. Is this ok with you? Anything you say will be anonymous, unless you agree otherwise, and we will destroy recordings when the research is complete. Remember participation is voluntary and you can decide to stop the interview at any time.

Are you ready to begin?

Record their name and role in relation to the E+ project and also their wider role.

Finding out about Impact+
1.   **How did X introduce you to Impact+**

Was it helpful to you in considering the impact of projects or services?
Probe each answer
- **If yes how**
- **If no why**
- **If in some ways**:
  - *Has it increased their knowledge about evaluating project impact*
  - *Are they confident in using Impact+ now*
  - *Check if its influenced their thinking but not yet their actions*

Using Impact+
2a. Have you used the Impact+ Exercise?

2b. Have you used/considered the materials ?
Probe on: their relevance, usability etc

Ask specifically about the **video guide** for the Impact Exercise? How have you used this? How helpful has this been?

Ask specifically about the **translated materials** Which language have you used? How helpful was this translated material and in what ways?

Change resulting from Impact+
3a. Have there been any changes to the way you delivered/will deliver your project or services, as a result of the Impact+?
- Yes – Could you describe what you have you done differently?
- No – Why not?
- *Ask specifically for changes in the way the activities were planned and delivered.*

3b. Have you changed your professional approach to evaluation as a result on Impact+ (if not covered in Q1)? How and how is this manifested?

Any issues or changes

4. Have you encountered any difficulties when using the Impact+ Exercise?

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

Project applications

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

- Yes – Probe on which ones? Did the exercise help?
- No

Final questions

6. Would you recommend / have you recommended it to others?

- Yes why
- No why

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.

Annex B: Case studies

Case study 1: Creating solid foundations for impact

Project: CASTLE - New employability skills and business creation in the audio description and subtitling sector
The CASTLE project supports cultural accessibility by ultimately aiming to make audio description more readily available for individuals who are deaf or hearing impaired and attending events at theatres, museums and cinemas. The project supports the professional development of audio describers and subtitlers, through training workshops designed to advance their enterprise skills and develop knowledge on how to promote the business of audio description and subtitling among theatres, museums and cinemas. The distinctive final transnational product will include the necessary steps to launch a new business.

Lead: Alison Carminke – University of Wolverhampton, United Kingdom

Partners: The partnership involves five EU Member States representing business start-up incubation, theatre, evaluation consultant, and cultural centre. It includes:
- University of Wolverhampton (Lead partner), United Kingdom
- Centro Diego Fabbri, Italy
- Producciones Audiosigno SRLU, Spain
- SASA INKUBATOR, D.O.O., Slovenia
- Centrum Kultury Wrocław-Zachód, Poland
- ARGO, Italy.

Use of Impact+
Overall the exercise has been used to guide planning activities, set a baseline and monitor activities. It has helped inform how the team set baseline questions from the early stages, rather than waiting (as they would normally do). It has been used at the beginning of the project and they will be following through the stages of the project using the tool. They would have liked to use it at the development stage, but did not due to timing.

The Impact+ training and guidance materials worked well for the activities they developed for the kick off meeting with partners. They used the impact sheet printed (with the four boxes) and the partners worked through the exercise. It guided discussions around areas of impact, what indicators they would be tracking and data sources:
"I've built it into kick off meetings I have with new projects. I'll get the Impact+ resources and schedule a session during the kick of meeting with the partners, go through the tool and identify what kind of impact we want to measure and how we want to measure it." (Project Leader)

"We've put the indicators into a separate impact indicator document and that gets reviewed every three months, so although it's not using the agency tools its taking the outcomes from that exercise and checking on them regularly." (Project Leader)
Regarding the tool's wider use, it has been used on other Erasmus projects as a refresher on how to gather data and used in project to support university contracts. It may be used in the future on non-Erasmus projects such as Creative Europe.
Translated materials have been used and *"they are very helpful and very good"*, particularly the Polish versions because the Polish partner is accompanied by an interpreter. Having translated materials meant they didn't have to wait and could follow along with the discussion more easily.

Value and benefits
The exercise has influenced their thinking and highlighted the need to fully consider how to identify stakeholders, mapping, and identifying different levels of influence. It has led to them using more targeted data sources and collection from the beginning of the project. It has helped them focus on impact and specific impact on groups, providing a more detailed overview of how to measure impact. A platform is being used to collect the information.

"I think it is also helping us to focus really on the impact on this specific group. Even though you can have an overarching idea of what you are going to do, it helps you to say this is the specific impact on this group and this is how we are measuring it. It gives you a really detailed overview rather than having a fuzzy idea…"(Project Leader)

There has been robust feedback from partners (who have varying degrees of evaluation experience) regarding understanding data sources and tracking information from the outset.
They saw the value in not having to go back and gather information and spoke about how **"easy and useful"** it is to use. **"I think they (partners) have enjoyed using it as well."** *(Project Leader)*

"During the meeting they said yes this is helping and making it quite clear and I can see what we can do. I was saying to them the point of this exercise is we know now the data sources we now need so we can track them straight away. The problem if you don't look at it at this stage is having to go back…. I think they all saw the advantage of trying to get data, particularly in audio description and subtitling ….it's going to be a lot more valid feedback than if they just tell us something at the end and don't really remember." *(Project Leader)*

The Project Coordinator has recommended Impact+ to her team at the University and would like to build it into new bids.

Case study 2: Using Impact+ for bids and project development

Project: Level Up.
Level Up is using a game-based learning approach to develop an interactive tool for use in guidance sessions with young people. This approach aims to breakdown stereotypes around vocational routes being a 'second choice' to academic education, by highlighting that learning outcomes in vocational training are varied and complex. The game guides them through the benefits of vocational training and simultaneously links them into wider labour market information showing the value vocational training within career pathways.

Lead: Dr Luke Postlethwaite, Aspire-Igen Group

Partners: The partnership involves seven organisations including vocational education and careers advice organisations working alongside educational technology and gaming specialists. It includes:

- Aspire-Igen Group (Lead Partner) United Kingdom
- Békés Megyei Kormányhivatal, Hungary
- Business Foundation for Education, Bulgaria
- Caped Koala, United Kingdom
- Cork Institute of Technology, Ireland
- Satakunnan Koulutuskuntayhtyma, Finland
- Volkshochschule im Landkreis Cham, Germany.

Use of Impact+
The team at Level Up team had a joint training workshop on how to use the Impact+ materials led by Dr. Luke Postlethwaite, Project Leader, the member of the team that came to the November Impact+ workshop in Birmingham. He cascaded the training to his manager who co led the workshop with his internal team. The Level Up Team previously used the logic model approach to impact measurement.

The team really like using the tool, and Luke considers the workshop has really helped his team in the longer term by supporting them to think strategically about impact: *"Impact measurement is something we all struggle with even after decades of experience between us in the company. Impact+ is a really easy way to figure it all through."* (Project Leader)

Luke went on to say, *"We have been using Impact+ as a companion tool to guide thought processes and structure for questions around impact. In lots of the bids we have been developing and you are considering*

questions around impact, it can be so jargonistic…so when you are writing a section you think, well what is the indicator for this, so you can check the logic of your answer through Impact+." (Project Leader)

Luke's team also had an extension to a one year Euroguidance project, so it became a three year project. The workshop for the team, *"helped them think on a strategic level about impact for a three year project"* according to Luke.

The Team went on to cascade Impact+ to a meeting in Finland for their project partners, where they had used the tool to help plan the project implementation. They used the tool as it stood, but made some bigger versions of the four sections of the tool referring to stakeholders – Partner organizations, Systemic, Project staff and Learners to use in group work.

Luke's colleague Michael Miller, Project Officer, helped deliver this workshop after having been trained by Luke. Michael believed the tool helped the international partnership reach a consensus on their goals. He thinks it was easier to consume than other approaches to measuring impact.

Value and benefits
Luke thinks Impact+,*"makes it really easy to figure it all through. It helps debunk the myths on data collection. There are lots of quick wins to help measure impact. Impact has often felt too abstract a concept and so was overwhelming."* (Project Leader)

Case study 3: Measuring impact on projects that are already underway

Project: SMILE – Sustainable Microbrewers Learning Across Europe.
The SMILE project is helping new entrants into the Brewery Business in Europe.
The project is developing training for entrepreneurs behind the beer renaissance.
The benefit of achieving SMILE Certification in Brewing Entrepreneurship is increased opportunities and skills to build successful, sustainable brewing businesses, through competence in the 3 fundamental pillars of professional brewing; brewing, business and due diligence.

Lead: Michael Ward, Mullingar Employment Action Group (Ireland)

Partners:
The SMILE project partnership consists of six organisations from five EU member states including social enterprises, universities, a college and private research organisation. It includes:
- Mullingar Employment Action Group (MEAG, Lead partner), Ireland
- DRAMBLYS social creativity lab, Spain
- The European Brewery Convention / Brewers of Europe
- GLAFKA s.r.o., Czech Republic
- Associazione Artistica Culturale A Rocca, Italy
- Inn Training, UK England.

Use of Impact+
The tool has been used fairly extensively, for example, in developing a strategy for measuring impact as well as in a project application (outcome as yet unknown). They found that as a lead partner, the Impact+ tool helps to clearly demonstrate to partners the necessary steps to demonstrate impact and why the steps are required.

The members of the SMILE partnership found Impact+ useful, and they have developed a joint strategy for measuring impact as a result, across the whole SMILE project. Partners generally have experience in business or other processes, but others are new to European funded projects and therefore they possess much less knowledge relating to impact measurement, making Impact+ particularly helpful to them.

Impact+ has helped SMILE redevelop their strategy for the second year of the project, solidify the exact data being collected and demonstrate specifically how it will be used. It has formalised the data collection process for the whole partnership.

Impact+ has assisted the SMILE project with developing their second-year strategy for the project and to set targets. In addition, an external evaluator is being used to collect information based on the application and the quality of the outputs.

Value and benefits
The SMILE project has indicated the workshop has reinforced the importance of measuring impact. It has helped them to focus on what they are disseminating and why - "*impact is the end result of disseminating*". They are currently developing a strategy to more efficiently disseminate the impact for better results:
"In the past we would have thought though similar aspects but we wouldn't have done it in such a formalised or structured way. The tools help us do it better." (Project Leader)

For the SMILE project, Impact+ has also formalised the process for completing applications and in developing their projects dissemination strategies. They were more 'laissez faire' in the past. They had not regularly used a toolkit to do this, so it has helped them to formalise the process and share it. It has specifically been used, for example, to identify who and how they would target through the project, and what metrics they would use to measure its impact:
"*…We didn't use tools specific for impact and dissemination before. …we didn't always know why and how were going into so much detail and a little bit more* 'laissez faire' *I suppose in implementation….. This is what we did before and we were going to do it again rather than tailoring the strategy to the project and the target group." (Project Leader)*

The SMILE project has also indicated they will potentially be using Impact+ to develop a joint impact measurement strategy for the project.

Case study 4: Developing an impact measurement strategy for delivering contracts and service level agreements

Project: Elastic: Exchange and Learning for Adult Social Workers -Training ICT Competences
The project aims to improve the ICT skills of professionals working in the field of education and social inclusion of adults in extremely vulnerability situations (e.g. homeless, migrant, asylum seekers, refugees, etc.). The project identifies new practices, develops new skills and tries new instruments to enhance the effectiveness of local welfare and community services. The project is targeted to adults within the population who are at risk of marginalization and exclusion. It also provides new tools to social workers to improve their work.

Lead: Roberto Zanon - Open Group, Italy

Partners: The partnership is made up of 10 organisations representing social inclusion, NGO networks, and a university:
- Spoleczna Akademia Nauk, Poland
- Asp Citta di Bologna, Italy
- Cesta Asociace Streetwork, Z.S., Czech Republic
- Feantsa, Brussels
- Documenta, Spain
- fio. PSD, Italy
- EAPN Cantabria, Spain
- Diesis COOP, Brussels
- PMFF, Poland.

Use of Impact+

The workshop was very positively received and it was very productive for the group to work together with the benefit of the tools, and also beneficial for the individual attendees too. It was found to be was well organised and the content was interesting:

"…very good I must say, both for the organisation and the group (participating with)..the content was very interesting and the organisation was well done…. I really think it was really well done and useful." (Project Leader)

The tools have been introduced to partners and used for development in their ongoing service contracts with the local government in Bologna. The organisation delivers a considerable number of services. For example, they have recently submitted 19 project or service plans covering the next 5 years. For the first time they have been asked for impact measures to be put in place. Although taking into consideration the tool is not built for this, it is simple to use and Roberto has used it to build evaluation into the 5-year plans:

"..we know it wasn't built for this kind of project but still it is seamless and can be used on different kinds of projects…so we decided to use it here (integrate into planning strategy)." (Project Leader)

Value and benefits

The four fields within Impact+ were found to be very easy to understand and use. The fields help the project sponsor measure impact in a more structured way than previously. The materials are very visual, not containing complicated numbers to work through as with other impact models, such as SROI (Social Return on Investment):

"…your Impact+ is much, much easier to understand and easier to use....it helps to have a more structured way to measure impact……before we worked much more on a more local level, so we didn't have that much structure about measuring…even for beginners like us, it is easy to understand and use." (Project Leader)

The tool has been used more widely than the partnership for their projects and service plans. When the plans are implemented, they will be using the Impact+ model. Roberto plans to brief others in the team on the model and tools because its value has been proven.

Case study 5: Becoming a source of expertise on European project evaluation

Project: CLEAR – Circular Economy Adult Training ToolBox – Knowledge ReUse

The CLEAR project is focused on senior education and aims to improve the level of Green Entrepreneurial culture in Europe by educating adult participants about the Circular Economy (CE) Servitisation Business Model approach, which is based on a vision of shift towards sustainable, low carbon, resource efficient services. Its objectives include: the creation of a training course for SMEs, active participation of seniors making use of their experience and knowledge, the innovative use of online training material through an open digital training toolbox and dissemination of the results.

Lead: Roger Esteller Curto - Jaume I University, Spain

Partners: The partnership involves four EU Member States representing two municipalities, a technical consultancy with expertise on eco-design, a social enterprise and two training providers (one expert in CE). It includes:

- Jaume I University (Lead partner), Spain
- Universitat per a Majors, Spain
- Gijón City Council, Spain
- Media Creativa – MC2020, Spain
- Sociedade Portuguesa de Inovação – Consultadoria Empresarial e Fomento da Inovação, Portugal
- Drosostalida Social Cooperative Enterprise, Greece
- Macdac Engineering Consultancy Bureau ltd (MECB), Malta
- Korydallos Municipality, Greece.

Use of Impact+

The project coordinator has used the English materials extensively, including with other departments within the University, but not as a whole process on a project yet. He will use it at the next partnership meeting for the section on dissemination. He believes the suggestions and ideas generation aspect of the workshop and tool will work very effectively within a partnership meeting: *"It is a good starting point for everyone…a good balance of theoretical and practical…"* *(Project Leader)*

As an evaluation method, they currently use feedback and quantitative data and generally survey all participants. However, they struggle to capture softer outcomes, and they will now use the tool to more effectively capture feedback throughout the whole project lifetime.

Roger is also currently introducing it across all Erasmus + projects coordinated by the University and within their Erasmus+ partnerships. He has so far introduced the tools to two other departments at the University and run them through versions of the workshop. Roger said that, *"…**the brochures and materials have been very useful because some of my colleagues have asked me about Erasmus+ projects…I found the materials more useful because I've been able to provide someone else with the materials."*** *(Project Leader)*

Value and benefits

Roger is now acting as the source of impact evaluation expertise within the University, running them through the exercise and helping develop their impact measurement methods. For example, professors generally have an idea for a project, however they forget that at the end of their project, they must demonstrate impact; 40% of the assessment process is based on impact measures, and when the professors understand this, everything changes:

"Professors are willing to do something, but they have a lot of doubts…they want activities but forget the national agency will want proof of the activities …the impact." *(Project Leader)*

Professors typically indicate they feel alone when making their applications from experience, so providing one professor with these materials and helping her through the workshop exercise has enabled her to feel confident in completing the application.

"The impact section on the Erasmus+ application form is the most difficult because it is not related to the area of knowledge of the applicant…It happens a lot in universities because we are so used to doing research in the cloud. We have to go to the ground and do it for somebody." *(Project Leader)*

He believes it will ultimately move the University away from more intellectual outputs and towards more direct impact measures based on participant feedback.

Case study 6: Working with evaluators

Project: Rainbow Years

The project is developing a new good practice model for the delivery of a mid-life 'skills' review – with the emphasis on reviewing skills and competences and targeted at those members of the labour market with low levels of basic skills in literacy, numeracy and digital literacy.

Lead: Ian Borkett, Trades Union Congress (TUC), unionlearn

Partners: The partnership involves six EU Member States representing universities studying labour markets, non-governmental adult education and training providers and researchers, Government Departments and a private social policy consultancy:

- Unionlearn, Trades Union Congress, United Kingdom (Lead Partner)
- Prospektiker, Spain
- Workers Education Association, Finland
- Learning and Work Institute, United Kingdom
- Bicocca, Milano University, Italy
- Céreq (The Centre for Research on Qualifications), France
- University of Exeter, United Kingdom (Project evaluator)

- IWAK, Frankfurt University, Goethe, Germany

Use of the Impact+

TUC unionlearn found the Impact+ Exercise extremely helpful in stimulating discussion at an early partner meeting following the Workshop. Using the materials provided at the Workshop has enabled a structured, methodical and simple way to discuss ideas on indicators, data sources and data collection for partner organisations: "*I found it extremely helpful in terms of focussing on key impacts and greater clarity on the main outcomes we want to achieve…….. it was very useful indeed.*"

The outcome from sharing a truncated version of the workshop training materials was a populated summary table of the key areas of assessing impact by identifying what they were trying to achieve collectively.

The video was used by the University of Exeter to refresh their understanding of the Impact+ Exercise ahead of the partner meeting. In addition, the University of Exeter went on to use the Exercise to plan and support the evaluation of another Erasmus+ funded project – in this case a Schools project called SPIDAS. TUC unionlearn also introduced the Exercise to their wider team as part of their annual strategic and business planning away day.

Value and Benefits

The use of the Impact+ Exercise is helping to shape the Project from the outset and will be used to manage the Project and inform the interim and final evaluation. As a result, the Exercise is being used at partner meetings as a project management tool:

"*…… at our partners inception meeting we completed the Impact+ chart and summary table, then typed it up and circulated it to partners for any further comments and observations. We have regular skype meetings with partners that enable us to update and make changes to the documents. At our second partners meeting we ran a review activity ………..we subsequently found that we'd not been specific enough so we were more precise in describing the key impacts and outcomes for the project.………As we have become more familiar with using the tool we have improved areas of our work, such as the range of data sources we will now use ………I'd say it's a working document.*" (Unionlearn Rainbow Year team member)

It is acknowledged that measuring impact across a project partnership can be complex. The Exercise has provided a communication platform for partners to first explore impact and improve their understanding in a simple and straightforward way. It sits well with and is complementary to other evaluation methods:

"*So in the Rainbow Years evaluation we are supplementing it with interviews and with an on-line survey. We have modelled the content of the online survey on the findings that came out of using the Impact+ exercise…….. We found that the Exercise could be complementary to a traditional partnership evaluation and ideally should be used at the early stage of a project.*" (Exeter University Partner Organisation and Project Evaluator)