

# Impact+ Exercise User Research 2019

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**Disclaimer:** The views described in this report are those of the authors and not necessarily those of the Erasmus+ National Agency in the UK.

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## Executive summary

### Background

In January 2019 research was commissioned to assess the value of the Impact+ Exercise developed by the UK Erasmus+ National Agency. The research assessed how the Impact+ training delivered by the UK Erasmus+ National Agency during 2017 and 2018 had supported and developed the individual participants knowledge and confidence in using the Impact+ tool. Additionally, it assessed how they had gone on from the training to use the Impact+ Exercise within their Erasmus+ partnerships, as well as how the tool and materials had been used within other projects and initiatives, including 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?

The research took place during the period March to May 2019. The research fieldwork took place across three main phases:

1. An online survey of 35 Impact+ training participants;
2. Follow up qualitative interviews with nine project coordinators; and
3. Development of four case studies.

Of the 75 potential interviewees who attended the 2017 and 2018 training sessions, 35 survey returns were achieved. From the analysis of the survey, a group were identified who were willing to be interviewed in person. Four case studies which have more specific lessons to share or which demonstrate good practice in utilising the Impact+ Exercise tools and materials were developed as the final stage of the fieldwork.

### Summary findings

All respondents to the survey indicated they would recommend the Impact+ Exercise to others, with a majority having already done so. This is a strong endorsement of the Impact+ Exercise, which sits alongside the high proportions of respondents who found the workshop helpful and who increased their knowledge in measuring impact as a result.

Overall the vast majority of respondents from the 2017 and 2018 training cohorts had made use of the Impact+ Exercise or were planning to use it in future. This indicates that it has found its niche within project activity. The majority of the respondents and interviewees were project coordinators, providing opportunities to use the Exercise to enhance reporting on Erasmus+, even where they have not shared it with others.

A more thorough understanding of outputs, outcomes and impact, as well as ways to collect and evidence data are clear outcomes for workshop participants, with increased confidence in using impact related measures.

Workshop participants go on to demonstrate a wide variety of ways that Impact+ can be integrated into their work. Feedback showed that it was being used to: structure new Erasmus+ applications; on

non-EU funding applications; to develop indicators; identify new data sources; help complete interim/final project reports; and support a kick off meeting with partners to build consensus around project approach and impact.

### **Impact+ within Erasmus+**

There is evidence from both the survey and the interviews that there have been significant changes to the way that Erasmus+ partnerships understand the impact of their projects as a result of the workshops and implementing the Impact+ Exercise. A variety of changes to project or organisational intelligence gathering methods have resulted from use of the Impact+ Exercise.

Successful implementation has depended largely on the planning and time given to the cascading of the Impact+ Exercise to the whole Erasmus+ partnership. Where partnerships have approached this as a joint learning exercise rather than a feedback session, giving it sufficient time to work through all the Impact+ Exercise stages, has been the most successful.

There were other cases where the impact within the organisation of the Impact+ training had been very limited, either by restrictions on time, lower levels of confidence amongst the respondents combined with inexperience in training others around impact.

Training participants pointed to the need to have more of the Impact+ Exercise in formats compatible with online sharing. Some projects have shared aspects of the Exercise through video conference, and would like online 'props' to support this process.

### **Wider use of Impact+**

The research has reviewed how Impact+ was being used in organisations. In a small number of cases, the impact+ Exercise was being adapted to work with client organisations including schools and colleges. In other cases, Impact+ had a profound impact on organisational practices, with large numbers of co-workers had being trained in its use.

### **Conclusions and recommendations**

Where fully implemented, the Impact+ Exercise has enabled partnerships to have a shared sense of purpose in collecting data, and develop a shared understanding of what they want to achieve. More rigour in methods and data collection has been evident in these cases.

Where less time has been dedicated to the sharing of the Impact+ Exercise, or the Impact+ Exercise has been shared online rather than through a 'worked through' process, the effects have been reduced.

Other important factors in Impact+ being successfully implemented relates to the confidence and assertiveness of the workshop leader in putting the process forward to others. The evaluation partner also needs to be willing to integrate it with existing evaluation methods.

Adjustments to the user guide and more online tools within the Impact+ Exercise suite of materials are recommended to support the greater implementation of Impact+.

## 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 Erasmus+ programme and projects is a key aspect of the role of the NAs.

In 2016/17 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 within or outside Erasmus+.

The resulting tool sets out a four stage model of measuring impact which constitutes the Impact+ Exercise. The stages are:

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 (impact summary).

Additional materials that form part of the support materials for the Impact+ Exercise include a workshop guide to support the further development of workshops on the use of Impact+ and a video guide to the Exercise, plus materials translated into several languages.

The Exercise materials were first tested with 25 beneficiaries during a workshop in May 2016. Following feedback, two further workshops were run in autumn 2017 involving 36 attendees to the training sessions, and in September-October 2018, another two workshops ran involving a total of 39 participants. At each stage evaluations of the workshops have taken place - checking the value of the training and the ongoing use of the Impact+ Exercise by training participants. For the first time in 2018, this group of trainees was also offered a follow up consultancy session to help them embed the learning from the training into their work. A small number took this up.

### 1.1 Research background

In January 2019 research was commissioned by the UK to assess the value of the training workshops provided to Impact+ training course participants, and consider how the Impact + training and tools that make up the Impact+ Exercise had impacted on participants' working methods and their Erasmus+ projects. In addition, this research was interested in how individual participants had used Impact+ Exercise in other contexts – such as other projects, or their mainstream day to day activities.

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?

The research took place during the period March to May 2019.

The research fieldwork took place across three main phases:

1. An online survey of 35 training participants;
2. Follow up interviews with nine project coordinators; and
3. Development of four case studies with additional interviews with project partner organisations.

### **1.2 The research cohort**

Of the 75 potential interviewees who attended training sessions, 35 survey returns were achieved, or just under 50%. The analysis of the survey results can be found in section 3.

From the analysis of the survey, a smaller group of potential interviewees were identified that attended either the 2017 and 2018 workshops, who had both used the Impact+ Exercise since the training, or who had something specific they wanted to share regarding the Impact+ tool or training, and who were willing to be interviewed in person or by telephone/online.

In addition, a small number of additional interviews were completed to support the development of four case studies illustrating specific aspects of the implementation of the Impact+ training and toolkit. These can be found in annex B.

### **1.3 Report structure**

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

- Section 2 covers the research methodology
- Section 3 discusses the survey research findings
- Section 4 outlines the qualitative findings from interviews
- Section 5 contains the conclusions and recommendations
- Annex A: Case studies
- Annex B: Full survey results
- Annex C: Research tools

## 2. Methodology

### 2.1 Research set up and ethics

Past attendees of the Impact+ training were the primary target of the Impact+ Exercise research. It was decided during the inception phase that including both 2017 and 2018 workshop participants in this research (carried out in 2019) would enable the research to cover a wider group of past participants. The research from 2018<sup>1</sup> (covering workshops carried out in 2017) had found that a number of participants in that year's training had not used the Impact+ exercise by the time the research was completed, and the 2019 research might pick up some of those who had been able to use it since that time. It would also capture some of the additional work done since the 2018 research by those who were actively using the Impact+ Exercise since they had attended the training in Autumn 2017.

A strategy for contacting the past trainees 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 from 2017 and 2018 training were asked if they would accept being re-contacted by the researchers, and they were reminded that the follow up research was referred to during the training workshops. If they did not opt out of the research at this point, the research team sent a link to an online survey with an invitation for them to respond. Three follow-up calls or emails were later sent to remind the potential interviewees to complete the online questionnaire.

### 2.2 Online survey

The survey used a well known online surveying tool that is easy to access and complete. The survey was developed using a mixture of multiple choice answers where respondents could tick one or more answer options; Likert scales using a 1-5 selection, 5 being the highest score and 1 the lowest; and open questions to explain answers that fell outside of the choices given. The survey checked if they had previously been interviewed about their project for the 2017 projects, routed respondents through the survey using a logical flow, and also offered the option to skip questions where they did not wish to respond.

The survey which took around 15 to 20 minutes to complete, covered the following areas:

- Background to their Erasmus+ project
- Views on the Impact+ Exercise workshop
- Assessing the use of the Impact+ Exercise in Erasmus+ projects and partnerships
- Changes to their Erasmus+ project and evaluation as a result of the Impact+ Exercise
- Use of Impact+ within their wider organisation
- Recommending Impact+ to others
- Suggested changes to the training.

### 2.3 Interview process

Following the survey we next chose a purposive sample of potential interviewees from the respondents to the online questionnaire. The criteria for selection included: those who had used the Impact+ Exercise in some way since attending the workshop; who had scored the Impact+ workshop

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<sup>1</sup> [Impact+ Exerciser User Research 2018](https://www.erasmusplus.org.uk/programme-impact) (Hay & Chandra, 2018) <https://www.erasmusplus.org.uk/programme-impact>

they attended highly from the online survey; and/or had scored more than 4 on a Likert scale of 1-5 on improved knowledge and confidence in using the Impact+ Exercise as a result of the workshop.

We had already sought consent through the survey for respondents to opt in to be interviewed further. Through this process of selection nine qualitative interviewees were identified, and interviews with them then took place during April and May 2019. The preamble to the interview itself included a further reaffirmation of consent to be interviewed, as well as be recorded. The interviewees were also assured of their anonymity, unless they were later to be chosen as a case study, and separately consented to waive this anonymity.

The research used one-to-one telephone or video interviews, or where there was an option, face to face interviews. Semi-structured topic guides were developed as to appropriate means of collecting qualitative data. The format of the topic guides allowed for exploration and probing using open-ended questions. The interviews typically lasted 30-60 minutes, with the face to face interviews being the longest.

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

- Explore further their views on the Impact+ training and exercise, video and translated materials.
- How they have used Impact+ since the training, and explore any plans to use it in future.
- How the Impact+ Exercise was introduced to project partners, and how it was received.
- In what ways the Impact+ Exercise has affected their Erasmus+ project's existing impact measures and evaluation plans.
- How Impact+ has been introduced to their wider organisation, or any other use to which it has been put.
- Any thoughts or recommendations on the timing or content of the training materials, or further development of the Impact+ content for the future.

Interviews were recorded and transcribed into 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.

#### **2.4 Case studies**

Case studies have been used to provide additional insights into the different ways that the Impact+ Exercise 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, which provided 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 in Annex C.

### **3. Survey of participants**

The online survey of participants went to all individuals who took part in the training in 2017 and 2018 of which there were 75. From this a total of 35 individuals responded (plus 2 that were not useable due to being incomplete). Of these 14 were individuals who attended training in 2017 and 21 in 2018. The survey results are given below, with the full tables and graphics of returns, in Annex B.

#### **3.1 The Impact+ Workshop**

The workshop was considered to be highly useful by the majority of respondents, with 86% indicating the workshop was either helpful or very helpful in considering the impact of their Erasmus+ project. Five individuals, or 14%, found it only somewhat useful, scoring three out of five on the Likert scale.

It was also found to increase the majority of participants' knowledge with 94% saying they had increased or greatly increased their knowledge about how to evaluate project impact. Additionally, 83% stated they had increased or greatly increased their confidence in using the Impact+ Exercise through the training.

#### **3.2 Use of the Impact+ Exercise**

A majority of workshop participants had used the Impact+ Exercise to help measure the impact of their Erasmus+ project since the training (69%). Of those that had indicated they had not yet used it, the majority of these individuals indicated they do plan on using it in the future. Of those who were planning to use it, the future uses they were planning included: introducing it at partnership meetings; using it to help focus on their evaluations; examining the impact of the project; and in the drafting of final reports.

Only one individual indicated they did not plan to use it in the future and this was because as an organisation they are using a different approach to impact assessment.

The majority of respondents indicated they have been using the Impact+ Exercise in an organisational context (80%). The most common use was in their Erasmus+ partnership (92%), with other uses including: in other Erasmus+ or European-funded projects; in other non-EU projects or activities; and to support their organisation/team and/or colleagues. Two individuals referred to other ways they were using the Impact+ Exercise. These included: cascading the method to colleagues who used it at an Erasmus+ kick off meeting; and using it for the planning of another Erasmus+ project.

#### **3.3 Use of the Impact + Exercise materials and video guide**

All 24 individuals who answered the question regarding the use of the materials from the Impact+ workshop indicated they had used them. Half (50%) had also used the video guide, which was available in English and subtitles in nine languages. One individual indicated they were not aware there was a video guide. Two-fifths (42%) had also used the translated materials which were available in English and other European Languages. Two individuals indicated they did not know these were available.

#### **3.4 Changes in Erasmus+ project delivery as a result of the workshop**

The majority of respondents who answered the question regarding the changes they had made to their Erasmus+ project as a result of the training, stated that they had delivered some type of change in their Erasmus+ project as a result of the Impact+ workshop (83%) since attending the workshop. The most common changes included: new impact measures for the project (15 respondents); and a new approach to gathering data (11 respondents). Others included: a new evaluation framework (7 respondents), different reporting structure (4 respondents), new data collection methods (3

respondents). Other changes recorded by three respondents were: a new approach to planning within current/new projects; getting all partners to talk about impact; and defining the impact of the project.

### 3.5 Changes to the workshop

Respondents were asked about suggested changes to the Impact+ training workshop, and the majority who answered the question (11 individuals answered) indicated they would not make any changes in the workshop. Comments included:

- I feel it was really well planned, executed and accessible;
- I thought the workshop was well put together and really made us all think about the differences between outputs, outcomes and indicators;
- The workshop is very well organised and the materials are well constructed, clear and easy to understand and use.

The suggestions for changes to be made included:

- having more examples of how to use the tool to help identify the adjustment needed when applying it in a specific context;
- making it more flexible for project-specific questions and challenges (e.g. finding indicators for difficult measurable impacts); and
- attending the training prior to writing the project plan, so Impact+ could be used more extensively (e.g. a longer kick-off meeting to allow for more time to devote to the exercise).

### 3.6 Use of Impact+ with partners

Almost three-quarters (74%) of those who answered the question on whether they had introduced the Impact+ Exercise to partners indicated they had done so.. A further 18% of respondents indicated they planned on doing so. Three respondents (9%) indicated they did not intend to introduce it to partners. One project commented that going over aspects of the exercise at the kick off meeting with partners helped them to work in a very structured and efficient way.

Regarding how participants introduced it to partners, the majority had discussed it at a meeting (19 respondents) and/or shared Impact+ Exercise materials with the project team (19 respondents). Other methods included: providing training or a workshop for partners (9 respondents), and mentoring colleagues or collaborators individually (6 respondents). The respondents were able to select more than one choice of answer. Some indicated they have a partnership meeting coming up in the future where they will be introducing or discussing Impact+ as an agenda item (8 participants).

### 3.7 Use of Impact+ in your organisation

A small number of individuals indicated Impact+ was being used elsewhere in their organisation, where they responded to the question (10 individuals). Of these individuals, seven were responsible for introducing it. The respondents to this question were able to have more than one choice of answer, so there were various ways in which Impact+ was being used organisationally, with exploring project impact being the most common way (7 respondents). Others included: in new Erasmus+ applications, Non-EU funding applications, developing indicators, identifying data sources, helping complete interim/final project reports and during a kick off meeting with partners to build consensus around project approach and impact.

### 3.8 Survey conclusions

All respondents indicated they would recommend the Impact+ Exercise to others, with a majority having already done so (86%). This is a strong endorsement of the Impact+ Exercise, which sits alongside the high proportions of respondents who found the workshop helpful and who increased their knowledge in measuring impact as a result.

Overall a majority of respondents (96%) from the 2017 and 2018 training cohorts had made use of the Impact+ Exercise or were planning to use it in future. This indicates that it has found its niche within project activity.

The wide variety of ways Impact+ has been integrated into projects indicates that it can sit well alongside or add value to existing project impact measurement activities. A variety of changes to project or organisational intelligence around using impact measures including a more thorough understanding of outputs, outcomes and impact, as well as ways to collect and evidence data are clearly indicated within the survey. These areas are explored further in the interviews (Section 4) and case studies (Annex A).

## 4. Analysis of interviews

### 4.1 Background to interviews

Following the online survey, nine in depth interviews were carried out, three in person and six by telephone or by video call. The profile of the interviewees was as follows:

- Six were representing the lead partners in an E+ partnership and three were not.
- Three were from UK based organisations, three were from Italian based organisations and the three remaining interviewees were from Iceland, Demark and Belgium.
- Five of the nine interviewees were from the academic sector, two were government/public sector and two were not-for-profit.
- Six were from 2018 training and three were from 2017 training workshops.

The overarching objectives and the types of organisations involved in the projects interviewed were varied.

### 4.2 Feedback on the Impact+ Workshop

Generally, all the interviewees found the workshop very well delivered, reflecting the comments made in the survey responses. One interviewee referred to being, *“very thankful able to attend the workshop in October where (she) learnt a lot”*. Another commented that the workshop was well structured, well planned and very interactive, whilst another described various aspects of the workshop that she felt could be improved, but still considered that the workshop was, *“very, very well done”*. She went on to comment that she would like, *“more specific information on monitoring and data (would have been useful) and how to lead on this aspect as it was not described well in the user guide. Also examples of data and how to customise it.”*

All interviewees confirmed that they had increased awareness of evaluation methodology through attending the Impact+ exercise Workshop. For all interviewees their knowledge of approaches to evaluation had been broadened by the introduction of the Impact+ Exercise.

The workshop had also raised the confidence of interviewees, particularly in applying the Impact+ Exercise in their project, but also in their approach to introducing the tool to partners and other colleagues in their organisation. For example, one interviewee commented that he felt confident in introducing the Impact+ tool following the workshop, and as a result he introduced the tool to the whole partnership through an online video meeting.

Another commented that he found the tool simple and easy to understand and this increased his confidence in thinking about how he could use it with the project partners as well as more widely in his organisation. As a result, within a couple of weeks of attending the workshop, he was actively using the tool. He also commented that because of its simplicity and the very good guidance and materials from the workshop, he had grown in confidence in how it could be used in the partnership and his own organisation.

Although a small number of those interviewed had indicated that they were already confident in evaluation methods, the workshop and tool had expanded their knowledge. For example, one interviewee commented that the workshop did not necessarily have any impact on her skills, as she was already confident in evaluation, but it had broadened her knowledge. Furthermore, she felt because the tool is simple and easy to use, it had enabled her to share the tool with others to help them understand impact-based evaluation.

Others commented on the dynamics of the training, and that working with others was an important aspect of learning the techniques within the Exercise. For example: *"It was a good group and everyone really contributed. I like it a lot and the activities were really useful. The networking was a huge benefit."* Another participant commented that she was not aware of the EPALE platform which was referred to in the training, and that they would use it in future as well as Impact+.

Various specific points were raised regarding additional or alternative ways of delivering the workshop content. These included:

- Development of an e-tool on a virtual platform as the basis for the training. This could then be available after the workshop and could be shared by partners so they can populate it on an ongoing basis, rather than rely on partner meetings to introduce and embed the tool.
- Have the option of case study exercises based on participants' projects rather than imaginary ones (though in practice this would not necessarily be possible to implement – see recommendations).
- Grouping participants working on a similar theme/issue to help share ideas and thinking of indicators, sources of data and stakeholders.
- More specific information on how to conduct monitoring to support impact measurement, and how to tailor data sources to their specific project.
- There was a further request around providing coaching or a follow up workshop on how to explore this with partners and lead a discussion and process within the implementation cycle (although this is offered already through the option for the follow up call after the training).
- One interviewee would have welcomed more materials to look at in advance of the workshop, and at the workshop more practice on how to prepare and lead sessions with the partnership to enable them to get the most out of the Exercise.

#### 4.3 Personal confidence in measuring impact

Interviewees commented on the changes for them personally as a result of the workshop. One interviewee commented that for her personally the Exercise has helped her look at different indicators, and how to prioritise which stakeholders and which indicators to use. The tool had helped her break down the project into parts, which had enabled her to look at what to measure and where to get the data from. She also noted that she had become more aware of the need to look at impact at all stages of the project and not just at the end. She has been able to pass this knowledge on to partners at the kick off meeting, who have all gone off from the meeting where she went through the exercise to map their stakeholders.

Interviewees picked up, in some cases, on the specific things they had learned. This learning had benefitted them professionally as well as their projects and other activities. For example, *"The most important thing I learned was about how to evidence impact and being smart about it... and gathering data. It's not just about what you are doing, your activities, but how and why you are doing it."*

However, one participant stated that she was not sufficiently confident or skilled in using the Impact+ Exercise, even after the training. This impacted on the ability of the partnership to understand or utilise the Exercise. She indicated she, *"could have used it better" and was, "not satisfied with how she used it"* due to her lack of skills in leading training for an inexperienced group. She described how, in the training session she developed for the partnership, she struggled to help them gain focus so they could agree on key points. She felt the meeting conclusion was, *"quite general and couldn't lead to an outcome... Each partner interpreted different things and struggled to customise it (content) to the project."*

#### 4.4 Follow up session take up

For those interviewees that attended a 2018 workshop where there was an option to have a follow up call to help embed the learning, only one took up the offer. The outcome was that they were able to plan the use of the time for their initial partners meeting to be more productive and have a better understanding of their objectives.

For those who did not take up the offer of a follow up call, time tended to be a factor, as well as some who felt they did not need any further support. For example, one response from a very experienced project coordinator, was that, *“the tool is simple and easy to use and follow ...there was no need for a follow up session.”* Another interviewee stated that because of competing work priorities, the offer of a follow up call *“fell down my list of priorities”*.

#### 4.5 Introducing Impact+ to partners

All of the interviewees had introduced the English version of the tool and materials to partner organisations. The way in which the tool and materials were introduced and used by the lead partner and partner organisations had varied. Time constraints at Erasmus+ project partner meetings was cited as a major factor in the degree to which the tool and materials had been embedded into project implementation cycles.

Various interviewees reported having online introductions to the tool with partners, or having one to three hours as an introductory training session with their partners on using the tool. This appeared to have a major impact on whether the Exercise was accepted by the partnership as a whole, and also whether it was embedded into the partnership’s approach to measuring impact. The interviewees felt that they needed longer in some cases to thoroughly introduce the Exercise to partners, but were not always able to do this. One interviewee commented: *“It is a great tool, extremely comprehensive. However, it is unrealistic to use it very much because time is so limited. I really like it and would have liked to have a full day to use it (with the partners).”*

Where the tool was introduced as a report back from attending the training and less time was dedicated to working through the exercise together, the less they were able to make long term changes to the project evaluation approach using the tool. For example, one interviewee described putting the Impact+ Exercise on the agenda for a couple of hours at the end of a partnership meeting. Though partners were interested in the tool and were positive about the tool, he reported that there was not sufficient time to make any joint decisions on this, especially as partners had to leave and catch planes during that slot. He does not feel optimistic that he will succeed in getting the Impact+ tool used by partners and support the evaluation of the project as a result.

Those that planned in advance, by training co-workers in the use of the tool, and gave more time during partner meetings to using the tool to shape their evaluation approach have found the benefits more evident. For example, one interviewee had spent a whole day with their partners to go through the tool and fully discuss and experience all aspects of the exercise. He indicated that it was not carried out as a training exercise, but more in the spirit of their project a peer to peer approach to learning the use of the tool for the project.

In these cases, where planning was properly done in advance, the introduction of the tool to others appeared to be well received: *“Everyone was enthusiastic and positive about the tool. A number of the partners felt they had gained knowledge, even though several of them being very experienced project leads for transnational projects... no one indicated they had come across the tool before.”*

One interviewee organised her workshop with partners according to their specific focus, so the area staff were in one sub group and developers in another. She thought this would enable them to look at common areas and bounce off ideas on indicators and stakeholders. Using this method she felt the partners found it easy to follow the tool. She led the session, breaking it down into each step so that it was easy for them to understand.

Whilst some interviewees were happy with the materials as they stand, a number of interviewees pointed to the need to have an online version of the tool rather than using paper based exercises, sticky notes etc. They felt this would enable them to work through video link, or to follow through on inputs with partners virtually after partnership meetings had ended. For example, one interviewee stressed if the tool were online, its impact would be more significant. He spoke very highly of the tool, even as an academic experienced in evaluation. *"If it were online its uses would be infinite and you can join others in gaining momentum and dump in ideas. Because it is a paper version, much of this momentum is lost and it is difficult to continue its life (after the workshop)."* Another stated that his concern is that there is little available online in terms of support and guidance to help partners to use the tool as well as jointly implement it in the project. This made it, in his opinion, less easy to develop methods with partners.

#### 4.6 Introducing the exercise at 'kick off'

Where the tool had been able to be introduced at the kick-off meeting, interviewees reported using it to clarify goals and outcomes, develop indicators and realistic data collection and sources, as well as mapping key stakeholders. One interviewee reported that it made them more efficient in planning aspects of their project by using it at this initial meeting.

Two of the interviewees highlighted that if they were to use the Exercise as a means to produce an evaluation framework, this was desirable as early as possible in the project cycle. One of the interviewees indicated that whilst they had introduced Impact+ through a video link meeting to their partners, it had not been integrated into their current mixed method evaluation, which was being led by one of the partner organisations. He reported that they were half way through their joint project and that the approach of the evaluation partner did not take Impact+ into account. He was hoping that he could encourage the use of the Impact+ tool to evaluate the project, although he had not got a plan in place about how he would do this.

Some interviewees felt that they were not able to introduce the exercise to their partners because their projects had already started, and that within an already operating project, this made adding an additional or new set of considerations unrealistic: *"It is a great tool, but the use is limited because it was introduced after the project started!"* One interviewee had overcome this issue however, and noted that the Exercise had provided a framework for their project report writing, but that, *"It would have been more beneficial to be introduced to it (Impact+ Exercise) at the beginning of the project. It makes more sense"*. Timing of the introduction of the exercise is therefore very important, although this does also illustrate that the tool can be used effectively throughout a project cycle.

#### 4.7 Video and translated versions of the exercise

Not all interviewees had used the video and the translated materials, however, with one interviewee stating that they had not been aware of the translated materials (although this referred to in the training and the Impact+ website). The translated tools were considered very important in helping effectively cascade the tool to their partners, as the partners were able to grasp the concepts and methods in their own language.

Where the video has been used by a lead partner it had been useful in introducing the tool and the concept of impact as an evaluation method within a partnership meeting. While others who were

aware had used them either within their own organisation with colleagues or shared them with partner organisations to use.

Interviewees also commented that they found translated materials very useful, as many partners are not fluent in English. A number commented that having the materials in their native language has produced better quality results.

#### 4.8 Clarifying thinking

For various interviewees, the use of the tool and materials had clarified partnership thinking on their evaluation approach and framework, and helped with understanding the value of this evaluation approach in supporting a more robust project. Some interviewees indicated that the Exercise had helped their partnership develop a new evaluation framework and impact measures. One interviewee referred to the Exercise helping them concentrate more on, *"what they are doing for the project and look better at the meaning of what they are doing - focusing on outcomes rather than outputs...The signs are good at the moment, that the partnership is starting to think beyond the bid and stop defaulting to outputs"*.

Another interviewee referred to an overall improvement in the partners' approach to impact measurement: *"Partners (now) work with impact better. Work Package leaders are not well versed in impact and it has helped to introduce them to it. It has been greatly beneficial and helped them focus and work on the topic (impact)"*.

A number of interviewees stated that using the Impact+ exercise had clarified the indicators, data collection methods and data sources. For example, one interviewee referred to the exercise had enabled them to get a shared approach to various aspects of developing data for a fuller impact assessment of their project: *"There is now a shared clarity on the impact indicators and how we will go about collecting the data and the evaluation framework."*

Another interviewee reported that the Exercise had helped them to look more closely at the data sources, to clarify and distinguish what will be used from, *"new views and from different angles"*. Another project pointed to the, *"difficult issue of identifying good indicators, so there is something they can clearly say about impact."* The interviewee felt the Exercise provided a solution to discuss this with partners, and talk it through and give sufficient time so that they could define indicators more effectively and reach a shared understanding.

Interviewees commented that the status of evaluating for impact had been raised across the partnership in some cases: *"Evaluation is now more a part of the project. After the workshop we think it is more important"*. They noted that previously they thought evaluation was for external professionals, but have found it a helpful way to develop their own skills as an organisation, and that they now understand evaluation is an important part of developing a strong quality project.

#### 4.9 Methodological changes

Interviewees pointed to the way in which the Impact+ Exercise helped them work together with partners on developing a robust evaluation methodology. For example, one interviewee commented that: *"the methodology being used (by the partnership) was very loose...the challenge is in finding a common methodology, which this has provided."*

Another interviewee reported that there had been a change in the starting point of their evaluation work on the project: *"Previously in their design and planning of projects, they have started with the question of 'what' and now the tool makes them start off with the question of 'why' so reframes the approach to evaluation."*

One interviewee commented on how the Exercise had helped them clarify their methodological approach and overall approach to reporting: *“Outcomes and outputs are often misunderstood. It has helped me to understand how to organise an impact report. It helps us (the partnership) - all being on the same page, with common strands for reporting and understanding where support is really being targeted at.”*

Some interviewees emphasised the way in which the rigour of their evaluation had been improved as a result of the Exercise. This had helped them consider the value of the project: *“There is often a real lack of rigour about what you are doing with money and think this (Impact+) really makes a difference... We're not just guessing and will see better results. It's about proper assessment and being really able to show money well spent.”*

One interviewee commented that, *“They (projects) historically think about actions and activities and evaluation is a difficult point for projects. In the future we will think about the project differently (more emphasis on evaluation).”*

#### **4.10 2017 cohort**

For those interviewees that attended a workshop in 2017, we might have expected the Exercise to have led to impact measurement being embedded more fully within the project activities. Indeed, one project did report that they had fully embedded Impact+ in their project approach throughout the implementation cycle. This interviewee had already adapted the tool for their advice and support work within their own organisation and was embedded as a resource for colleagues to use. This interviewee referred to how his confidence in the adaptability and application of the tools grew as he has introduced it to wider colleagues. In other words, using the tool over a period of time enabled him to become more experienced and skilled, helping him to cascade the method to others successfully.

Others, however, reported that time constraints had meant that the Exercise had not been fully embedded in their evaluation approach for the project, citing difficulty with time to apply and implement the tool. One of the interviewees who attended a workshop in 2017 still felt it was still too early to indicate if the tool has been embedded in the evaluation approach yet.

Another had difficulty in using the tool with partners, primarily because they were not working directly with learners, and partners had struggled to make the connection with their project as a result. This interviewee was clear this was related to the way she introduced the exercise to the partnership than the tool itself – although she did suggest the training could cover how to deal with this issue in more detail in future, through more preparatory materials being provided, more group discussion, and some clearer details in the user guide on adapting and using the tool for different contexts.

Interviewees that had introduced the Impact+ Exercise indicated that partners were very positive about the tool and none of the partners had not come across it before. For the project that had fully integrated Impact+ they had adapted the materials to suit their needs and integrated it with other approaches including the Golden Circle (Simon Sinek model focussing on ‘why’).

#### **4.11 Wider organisational use of Impact+ Tool**

Seven of the interviewees had introduced the Impact+ Exercise to colleagues in their own organisation. Of the two that have not yet introduced it to their wider organisation, one felt that it did not have relevance to the tasks of their small team in developing and managing projects. The other had used it to help write another Erasmus+ project proposal.

For those that have introduced it in their own organisation the degree to which it has been used has varied. For six of the interviewees, it had been used either in project design, planning, project

proposals and structuring reports. One 2017 interviewee had delivered a workshop for his team to introduce the tool and show how it can be used in their work. He has also put on workshops for other colleagues and provided advice on how the tool can be used. He has become the lead on this particular tool within the organisation. Since introducing the tool and materials to his colleagues in his organisation, of which there are 500 advisers, it has become embedded in their daily work, and now is being embedded into the whole of the organisation as part of their toolkit of organisational resources. By way of contrast, another had demonstrated it to a very small number of colleagues but they had not used it more widely and had not clarified plans to do so. He liked the Impact+ approach but was unable to see where it would fit going forward.

Interviewees commented that within their organisation, Impact+ has helped to introduce a better understanding of impact and in particular the design and planning of new projects and structuring reports for Erasmus+ and other projects. For example, one project referred to *“Experienced coordinators of their Erasmus+ projects have also grown in confidence in using the tool.”*

One interviewee has introduced the tools to her ‘collaborators’ and colleagues in her organisation in the design of their next Erasmus + project. This was done by organising a workshop meeting and then using the slides to introduce the tool and discussing the different elements of impact to clarify the evaluation framework. For this collaboration they used the materials in Italian to look at what the main goals would be for the new project and what they would be looking to measure. The video was not used and only the slides from the workshop. As this project is looking to improve the skills of trainers to engage and retain young people who have dropped out of training programmes, they have decided to look at introducing a control group that receive no additional support and using psychometric social measures to understand the impact the intervention makes.

#### **4.11 External use of the Impact+ Tool**

One of the interviewees has adapted how the impact tool is in order to help with his colleagues support for schools and colleges. They implemented a system previously, but have now combined this with the Impact+ Exercise. He developed some ‘posters’ of the Impact+ materials and resources (around 10) plus some templates, and these are now used with schools and colleges when introducing the Exercise.

Another interviewee is thinking of using the tool and slightly adapting it to work with a group of young people in measuring the difference the course they are attending has made to them. She feels it will help them think about their goals in relation to accessing the labour market.

## 5. Conclusions

Referring back to the research questions, the conclusions from the research follow.

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

There is evidence from both the survey and the interviews that there have been significant changes to the way that partnerships understand the impact of their Erasmus+ projects. This has depended largely on the planning and time given to the cascading of the Impact+ Exercise to the whole partnership. Those partnerships that have approached this as a joint learning exercise rather than a feedback session, giving it ample time to work through all the stages, clearly being the most successful.

At its best, the Impact+ Exercise has ensured partnerships are all working together on collecting data with a shared understanding of what they want to achieve through the project. More rigour in methods and data collection has been evident in these cases, and increased confidence in using impact related measures has been cascaded to the wider Erasmus+ partnership.

Where less and arguably, insufficient, time has been dedicated to the Impact+ Exercise within partnerships, or the Impact+ Exercise has been shared online rather than through a worked through process, the effects on partnerships has, not surprisingly, been less. This, in part, relates to the confidence and assertiveness of the workshop leader in putting the process forward to others, their experience as trainers or facilitators, as well as partners being willing to work through a full cycle of the exercise together. In addition, it appears to be related to the attitude of the evaluation partner, who needs to be willing to take the process on board and integrate the Exercise within existing working methods of evaluation.

Workshop participants have also pointed to the need to have more of the Impact+ Exercise in formats compatible with online sharing. Some projects have shared aspects of the Exercise through video conference, but would have liked more online 'props' to support this process. The case studies consider this view in more depth (Annex A).

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

There has been a clear impact on both participating individuals, their organisations and their partners. The catalyst for this has been the training workshop which was highly valued. Specifically, we can see from the survey that there has been a rise in personal confidence in individuals in their understanding and knowledge around impact evaluation. This is illustrated by more sophisticated thinking on the difference between outputs and outcomes. This has fed into a more creative ways of approaching data collection, affecting the development of existing projects, bids for new Erasmus+ funding, project reporting and creative thinking around ways to adapt the Impact+ Exercise for other contexts. As the majority of the respondents and interviewees are project coordinators, some have used the Exercise to develop their approach to reporting on Erasmus+, even if they have not shared it with the wider Erasmus+ partnership or their organisation.

The research has reviewed how Impact+ was being used in organisations, outside of the project respondents themselves were coordinating or involved in. Feedback showed that it was being used to: structure new Erasmus+ applications; on non-EU funding applications; to develop indicators; identify new data sources; help complete interim/final project reports; and support a kick off meeting with partners to build consensus around project approach and impact.

In some cases, Impact+ had a more profound impact on organisational practices, whereby large numbers of co-workers in some organisations had been trained in its use through a cascade system and the tools of the exercise shared on the organisational intranet. It had been integrated into existing organisational approaches to evaluation and impact measurement, by adaptation of the models to work together. In a small number of cases, the impact+ Exercise was being adapted to work with client organisations including schools and colleges. This indicates that where consistent exploration of how the tool can be used or adapted within organisations and other projects is taken on by the Impact+ user, this increases their understanding and knowledge of the Exercise, but also their confidence in imparting it to others.

There were other cases where the impact within the organisation of the training had been very limited, either by restrictions on time, lower levels of confidence amongst the respondents combined with inexperience in training others, especially around impact.

There were some specific requests about the Exercise itself, to be developed on a virtual platform. Respondents argued it could then be available after the workshop and could be shared by partners so they can populate it on an ongoing basis, rather than rely on partner meetings to introduce and embed the tool.

## Annex A: Case studies

### Case study 1

#### **Project: Workplace Learning – What can we learn from each other**

The Project is developing and sharing good practice in the design and delivery of education and training approaches for work based learning – with a particular focus on groups of workers with different social needs. The partners will undertake a peer evaluation approach to learning about what works.

**Lead:** Tim Van Aken, Pedological Advisor, Catholic Education, Flanders

**Partners:** Belgium, Spain (Lead Partner), Portugal, Estonia, Slovenia and Germany.

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

The Project Lead found the Impact+ Exercise simple to follow and easy to use and very helpful in stimulating discussion on measuring impact at their first partnership meeting following his attendance at the Impact + Workshop in 2017. The video and translated Impact+ materials were shared in English and made available to partners. There is no external evaluator as there is a peer evaluation approach. Using the Impact+ workshop materials has enabled partners to explore a shared understanding of impact for their joint project as well as their individual project and what they will measure.

Tim, Project Lead: *“In the first partners meeting, ... some time (had) passed since developing the project. To get all the partners in the same direction...I used the Impact+ tool to help us all focus on what we are trying to achieve here.”*

Antonio ESPROMINHO, BRAGA, Portugal, Partner: *“...it was very important (Impact+).....it helped us reflect on our objectives and all our goals and all the processes relating to the different actors in each of our projects...the tool enabled us to debate with each other and share our own ideas with each other and commentate on the results in agreeing what were the most important goals for the joint project and which were important for each of our projects.”*

Tim has also introduced the Impact+ Exercise to colleagues within Catholic Education Flanders. He is now the lead trainer on the Impact+ tool and has adapted the tool by changing some of the terms to reflect his organisational objectives and support the development of their work, thus enabling colleagues to focus on impact relevant to their work areas. The Impact+ Exercise has been embedded as one of their organisational evaluation tools for his extensive network of colleagues to use.

#### **Value and benefits**

The Impact+ Exercise is being used at all the partner meetings as a project evaluation tool to reflect and review their approach to evaluating their joint project. The tool has reframed their approach to evaluation.

The outcome for the project and partners in the use of the Impact+ Exercise has been a more shared and explicit understanding of why they are all participating in the project, and optimising their respective organisation’s learning towards improving practice – supporting their ‘peer to peer’ evaluation and learning approach.

Antonio, Esprominho, Braga, Portugal Partner: *“...as this project is a peer evaluation of work based learning it has been very helpful to evaluate the project and understanding if we are getting the results we wanted in the first place.”*

Furthermore, the tool has broadened the range of evaluation and management tools now used by the Catholic Education Flanders in supporting their work with schools and education institutions as its value has been proven.

Tim: *"We are using the tool in the early stage of designing a project with schools. .... we take more steps now to clarify and plan the process of how we will tackle the organisational problems of the school. We also use the tool to help with the implementation of a project or how we will solve the organisational problems of the school...In past we had started with the question of 'what' and now the tool makes us start off with the question of 'why'.*

The Impact+ tool has helped them focus on relevant data when thinking about appropriate indicators to measure impact. It has provided the project with a more evidenced based approach.

## **Case study 2**

### **Project: Sustainable Tourism: Training for Tomorrow (STTft)**

The aim of the project is to jointly develop a European standard for Sustainable Tourism Training for Protected Areas, drawing from the experiences of the European Charter for Sustainable Tourism in Protected Areas.

**Interviewee:** Fernando Correia, University of Hull, UK

**Lead:** Prof Elke Hermans, Universiteit Hasselt, Belgium

**Partners:** UK, Germany, Italy, Spain, France

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

The most significant influence of Impact+ has been in providing a tool which helps the partnership focus more effectively on addressing the needs of the target audiences and partners of the project. They are now looking more effectively at outcomes, rather than just outputs. However, because the workshop was attended in October 2018, it is still very early on its use throughout the partnership.

Fernando spoke very highly of the Impact+ Exercise, even as an academic experienced in evaluation: *"The value is being able to keep adding to it and have a common online tool we can share and populate."*

Fernando highlighted that if Impact+ was contained in a platform or virtual representation of its current paper based version, it would become easier to implement directly after the training and continue to be populated and used with partners. In its current format, he noted that it has been difficult to keep a continual 'live' flow of information and ideas throughout the partnership. He has realised through experience, that it was unrealistic to expect that in its current paper based format, partners would continually be able to effectively share their content and changes across the partnership. It is for this reason that a virtual tool could have much greater impact on the project, through the momentum of ideas continually shared and implemented.

Fernando has looked for a cost effective online platform to share the Exercise, but suggests that the creation of such free online tool could be something national agencies could develop for the use of project holders and developers, as others will likely face similar challenges.

Fernando: *"If it were online its uses would be infinite and you can join others in gaining momentum and dumping in ideas. Because it is a paper version, much of this momentum is lost and it is difficult to continue its life (after the workshop)."*

Fernando also highlighted that it is important to remember the Impact+ Exercise exists in an environment of competing priorities, therefore the time that can be put aside for working on impact is very limited and often heavily focused on delivery aspects. *"It is a great tool, extremely comprehensive. However it is unrealistic to use it very much within the context of partners' meetings because time is so limited. I really like it and would have liked to have a full day to use it (with the partners)."* The focus for the partnership is often on practicalities of implementation going forward, this is why focusing time on impact only is difficult.

The timing for the introduction of the tool was also highlighted as having great significance and it was suggested that holding the Impact+ workshop pre bid development would be ideal. *"It would have been very useful to have the tool before the bid was developed and would have added a lot more value with this timing. The current stage it has been introduced at limits is impact because by then most of the deliverables and outputs have been defined, and the partnership then needs to focus on the logistics of delivery (even though impact is important), within a very limited time-frame."*

### **Values and benefits**

Impact+ was presented at the first transnational operational meeting. The partnership used the basic Impact+ diagram, however there were time constraints so they were only able to address the inputs and looking at indicators would be the next step.

It is overall too early on to say how the partnership may have changed from the use of the tool, however it has helped focus the partnership on the importance of measuring impact: *"It has triggered discussions of what is important (in regards to measuring project impact). It has increased partners' awareness. Traditionally the focus on such kind of project has been on outputs, more than outcomes."* It has helped foster a shift in the discussion from a more historic approach looking at the numbers of participants to looking more at how the project affects these participants.

Fernando: *"It has helped us focus more on what we wanted to do for the project and look better at the meaning of what we are doing - focusing on outcomes rather than outputs alone. In regards to change, at a later stage the impact could be positive. The signs are good at the moment, because the partnership is starting to think beyond the strict script of the bid and stop defaulting to a narrow set of fixed outputs. But it is always a challenge, because in the end the project will need to report to evaluators on the planned outputs written in the bid document, and introducing the flexibility to look at outcomes more holistically after its start can be a risk. Hence why the ideal timing to use the tool would be during the bid-writing process."*

### **Case study 3**

**Project: Interface – Innovation and Entrepreneurship for Fragile Communities in Europe (<http://interface-project.eu>.)**

The project aims to share learning of training and development support models and approaches undertaken by regional and sub-regional agencies that help local disadvantaged communities to develop business ideas and community projects that will regenerate the local economic and social infrastructure.

**Lead:** Kristjan Halldorsson, Byggdastofnun, Regional Development Institute, Iceland

**Partners:** Iceland, Greece, Italy, Bulgaria, Ireland, Iceland

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

The introduction of the Impact+ Exercise at the 2017 workshop was timely for the lead partner in thinking about an evaluation framework. Kristjan found the Impact+ Exercise straightforward and easy to follow. The tool offered a concise evaluation model and enabled the lead partner to think about the impact of the project in a more systematic way at an early stage in the life of the project.

*Kristjan: "I already had been thinking how to evaluate this project...and thinking about the logic model and thinking about similar evaluation issues. What I found interesting about the model shown (Impact+) ...it was compact and concise and a well guided method to do this evaluation of our project."*

The Impact+ Exercise was initially introduced at the second "face to face" partners meeting in March 2018, which followed the Impact+ Exercise training workshop held in December 2017. Then followed up at a further 'face to face' meeting 8 months later at a partners meeting. However, due to the busy agenda for the partners meeting, time was limited in exploring how partners could use the tool in the project.

Though the lead partner is quite enthusiastic about the tool, Kristjan has found that competing project management priorities on his time have restricted his ability to plan the use of the Impact+ Exercise and guide with partners.

*Kristjan: "I definitely still think I'm better equipped on working on impact. However, through my efforts to use this in the project – well let's say limited effort to export it (Impact+) to other partners...I'm not optimistic I will succeed. There is limited time for us (partners to meet in person). I need to figure out how it can be done properly on an internet basis".*

*Kari Joensen, Bifrost University Iceland Partner: "We tried using it (the tool) – selecting bits and pieces out of it to get ideas flowing, but there was not enough time in the programme to do everything from start to finish."*

### **Value and Benefits**

*Kristjan: "...in my opinion it has helped me to focus better on the importance for the evaluation to be systematic and think about these things at an early stage in the project. Before my thoughts were scattered all over the place."*

Kari, from partner organisation Bifrost University, felt the tool had relevance and could be used for project design and development where there was a strategic partnership required working on achieving a societal impact, with the need to understand impact from the involvement of many different stakeholders.

The guidance and the tool was viewed as very helpful by the partners and has certainly maintained Kristjan's confidence in how it can be used. However, with limited time for partner meetings in person during the life of the project, he would find it helpful to have an interactive online platform that provides resources to help partners apply the tool to their project as part of online meetings or even between such meetings.

*Kristjan: "...the problem is not the tool and the guidance that is provided – which is very good – nor how the materials in introducing the concept of impact, but how I and partners can be further supported in how we can use it in our project online...this is the obstacle when partner meetings in person are restricted by cost and time".*

#### **Case study 4**

##### **Project: Digital Champions**

The Digital Champions project is developing an innovative training package and methodology of work to be used by adult educators and carers of vulnerable adults with disabilities, learning difficulties or low-skilled migrants. The project will build an online platform to host the training resources and produce case studies from each partner country to demonstrate how the learning techniques can be applied in different European contexts.

**Lead:** Tanya Cook, A1 Community Works Ltd, UK

**Partners:** UK, Cyprus, Italy, Germany

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

Tanya attended the workshop in 2018 and the most significant impact so far has been providing an effective impact measurement tool which can be effectively used throughout the partnership and beyond:

*Tanya: "Personally, I am pretty confident in using evaluation, however everyone has a different view on social impact or progress reporting. The methodology being used (previously) was very loose...the challenge is in finding a common methodology, which this has provided. Outcomes and outputs are often misunderstood. It has helped me to understand how to organise an impact report. It helps us - all being on the same page, with common strands for reporting and understanding where support is really being targeted at. There is often a real lack of rigour about what you are doing with money and think this (Impact+) really makes a difference."*

It has helped the partnership to look more effectively at data sources - to clarify and distinguish what will be used – bringing in new views and from different angles. They are also now more focused and accurate about their evaluation approach:

*Tanya: "We have been able to argue a stronger case for evaluation (importance of) and monitoring, due to now having an evaluation framework. We're not just guessing and will see better results. It's about proper assessment and being really able to show money well spent."*

##### **Value and benefits**

The Impact+ tool has been shared throughout the partnership and the partners have been involved with using it and have feedback that it is a robust tool. It was presented informally in the first two meetings and more formally later on. Impact is now a standing agenda item, because of the Impact+ exercise. The partnership has experienced a change in perspective about how to measure impact:

*"The whole thing (I+) is conscious raising and we have experienced a shift from delivery to research responsibility with data."*

Tanya praised the Tool for its practical use in a small, rural based organisation such as theirs: *"In a small organisation there are no fixed rules, people work in other ways. Having tools to give structure is very useful. In our judgement this is a very good tool."*

The tool was also commended for its elasticity and usefulness: *"The tool is flexible and practical - you don't want the system to be driving you. We are now more detailed and have a better structure (about evaluation)."*

Impact+'s approach is clearly now imbedded in the organisation and the partnership: *"I+ is one of the main models we are using (for evaluation). It is flexible across a number of projects. It needs to work*

*in a practical sense...We have moved from being more delivery focused, to more actively designing activity with partnerships, with a view to shaping policy."*

Tanya also reflected on what next, post Impact+ workshops: *"Impact+ shouldn't just vanish, because we gained a lot from it and others should too. It is well structured, well planned and the workshop was very interactive and well thought out. It would be a shame if it was lost".*

## Annex B: Survey results

This annex includes tables and charts for all the relevant online survey questions.

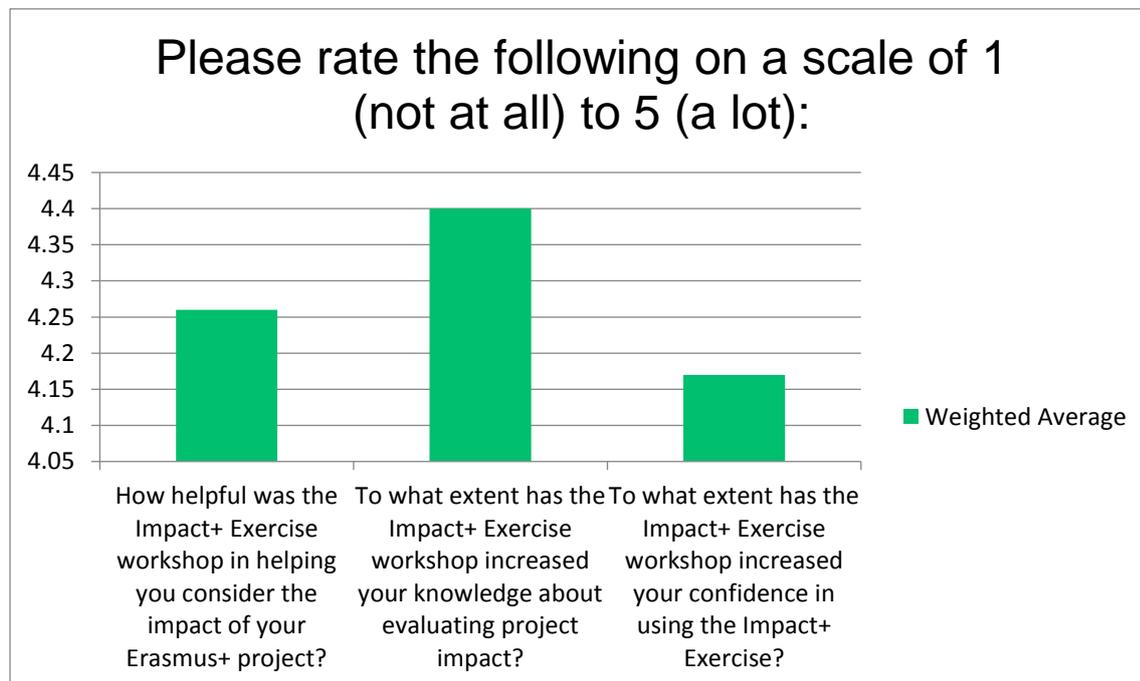
### 1. How helpful was the Impact+ Exercise workshop?

Please rate the following on a scale of 1 (not at all) to 5 (a lot):

	1 (not at all)	2	3	4	5	Total	Weighted Average
How helpful was the Impact+ Exercise workshop in helping you consider the impact of your Erasmus+ project?	0.0% 0	0.0% 0	14.3% 5	45.7% 16	40.0% 14	35	4.26
To what extent has the Impact+ Exercise workshop increased your knowledge about evaluating project impact?	0.0% 0	0.0% 0	5.7% 2	48.6% 17	45.7% 16	35	4.4
To what extent has the Impact+ Exercise workshop increased your confidence in using the Impact+ Exercise?	0.0% 0	2.9% 1	14.3% 5	45.7% 16	37.1% 13	35	4.17

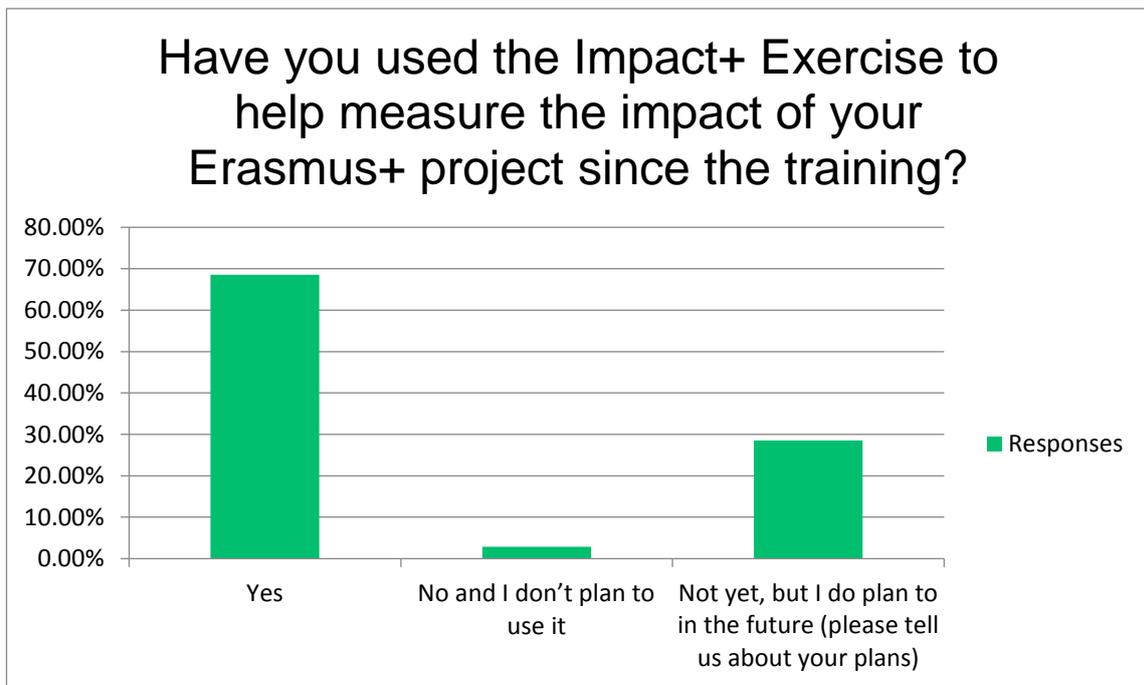
Answered  
Skipped

35  
2



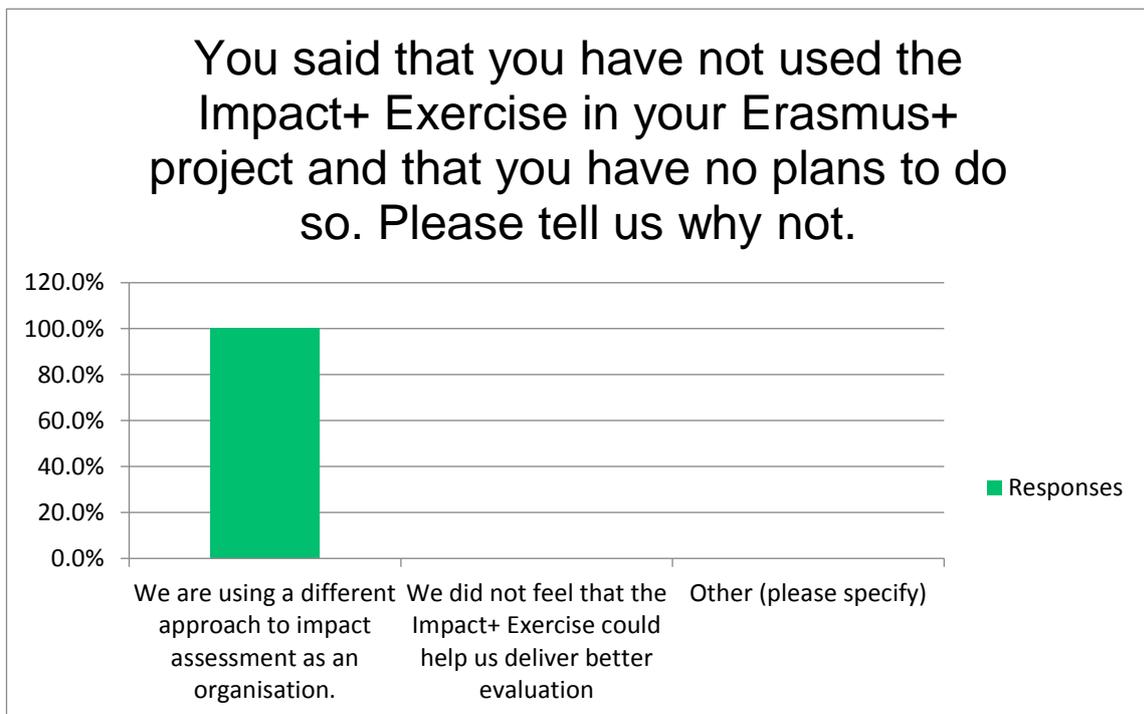
**2. Have you used the Impact+ Exercise to help measure the impact of your Erasmus+ project since the training?**

Answer Choices	Responses	
Yes	68.6%	24
No and I don't plan to use it	2.9%	1
Not yet, but I do plan to in the future (please tell us about your plans)	28.6%	10
<b>Answered</b>		<b>35</b>
<b>Skipped</b>		<b>2</b>



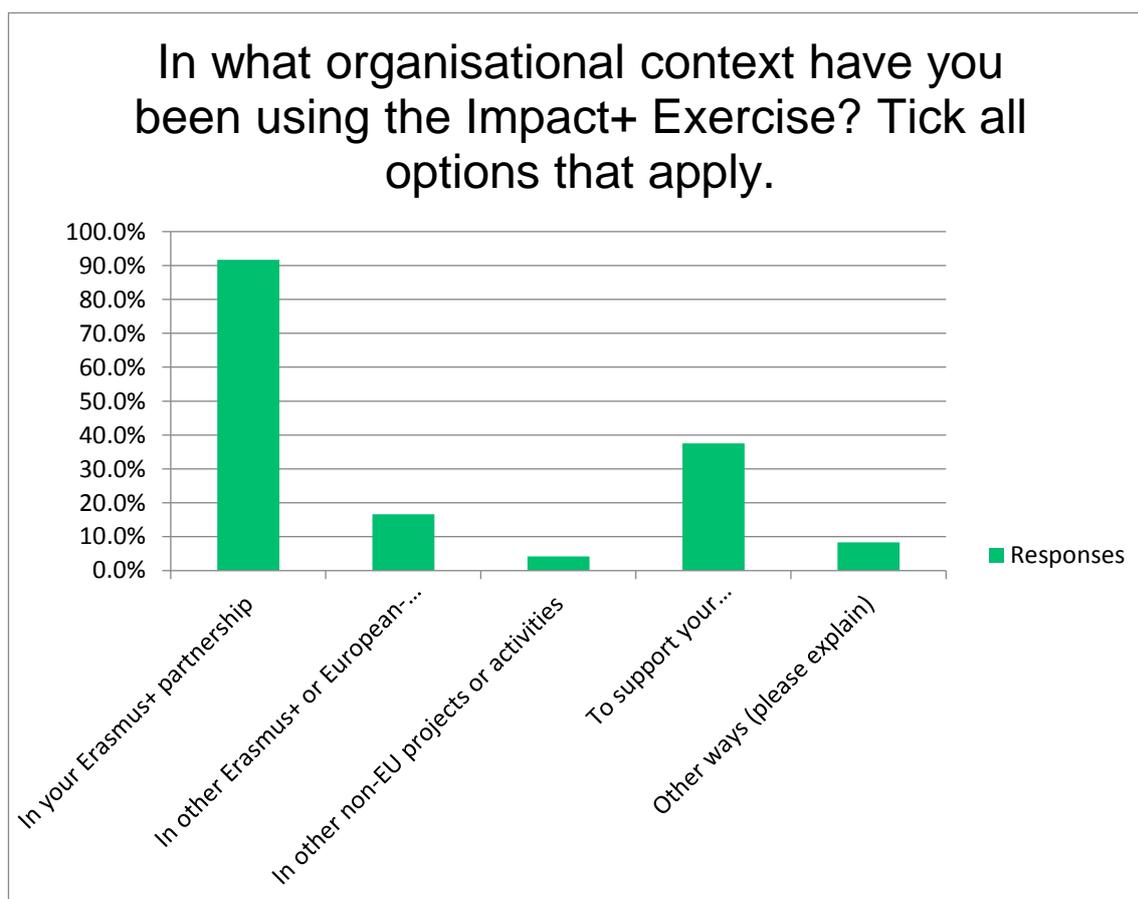
**3. You said that you have not used the Impact+ Exercise in your Erasmus+ project and that you have no plans to do so. Please tell us why not.**

Answer Choices	Responses	
We are using a different approach to impact assessment as an organisation.	100.0%	1
We did not feel that the Impact+ Exercise could help us deliver better evaluation	0.0%	0
Other (please specify)	0.0%	0
	<b>Answered</b>	<b>1</b>
	<b>Skipped</b>	<b>36</b>



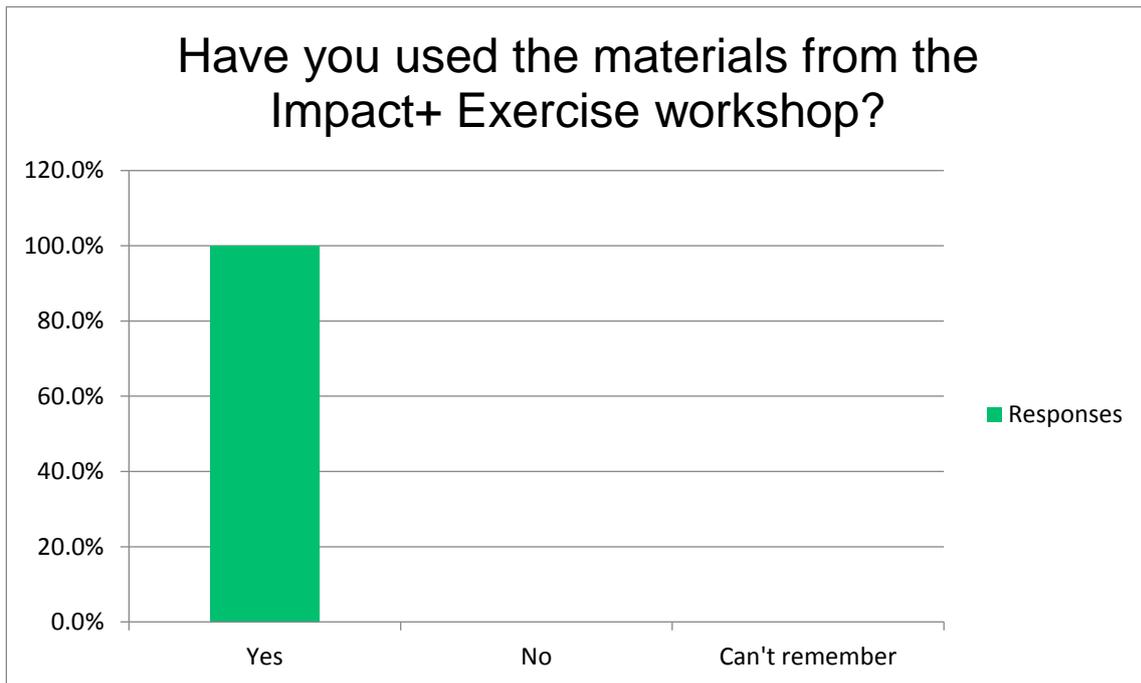
**4. In what organisational context have you been using the Impact+ Exercise? Tick all options that apply.**

Answer Choices	Responses	
In your Erasmus+ partnership	91.7%	22
In other Erasmus+ or European-funded projects	16.7%	4
In other non-EU projects or activities	4.2%	1
To support your organisation/team/colleagues	37.5%	9
Other ways (please explain)	8.3%	2
	<b>Answered</b>	<b>24</b>
	<b>Skipped</b>	<b>13</b>



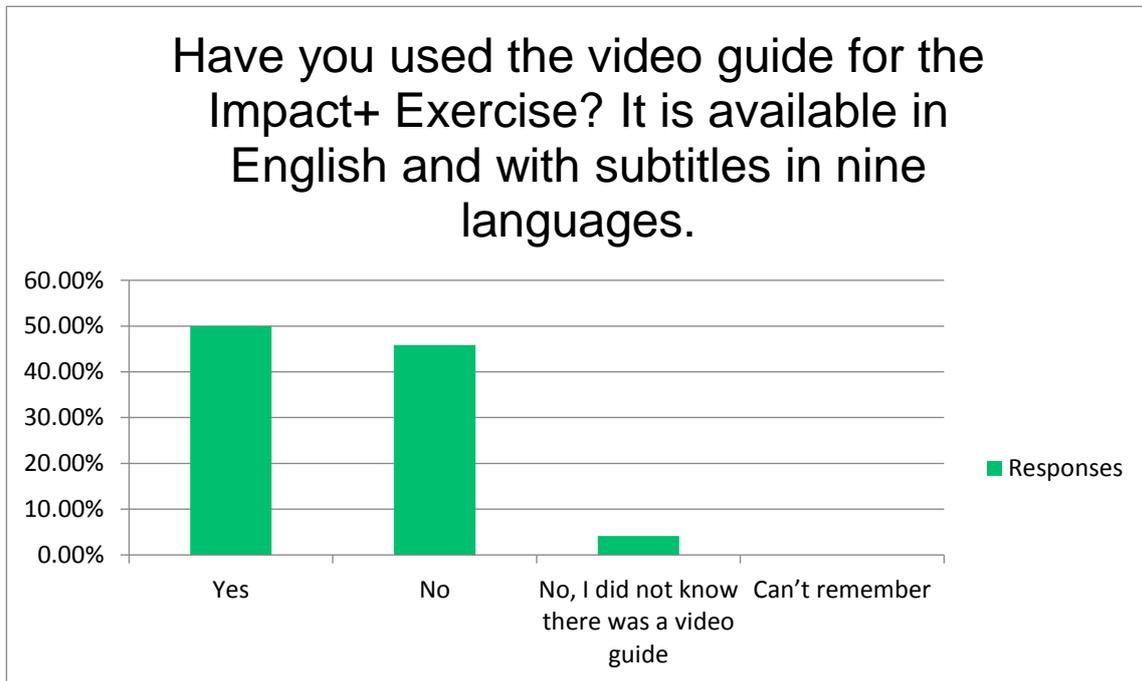
**5. Have you used the materials from the Impact+ Exercise workshop?**

Answer Choices	Responses	
Yes	100.0%	24
No	0.0%	0
Can't remember	0.0%	0
<b>Answered</b>		<b>24</b>
<b>Skipped</b>		<b>13</b>



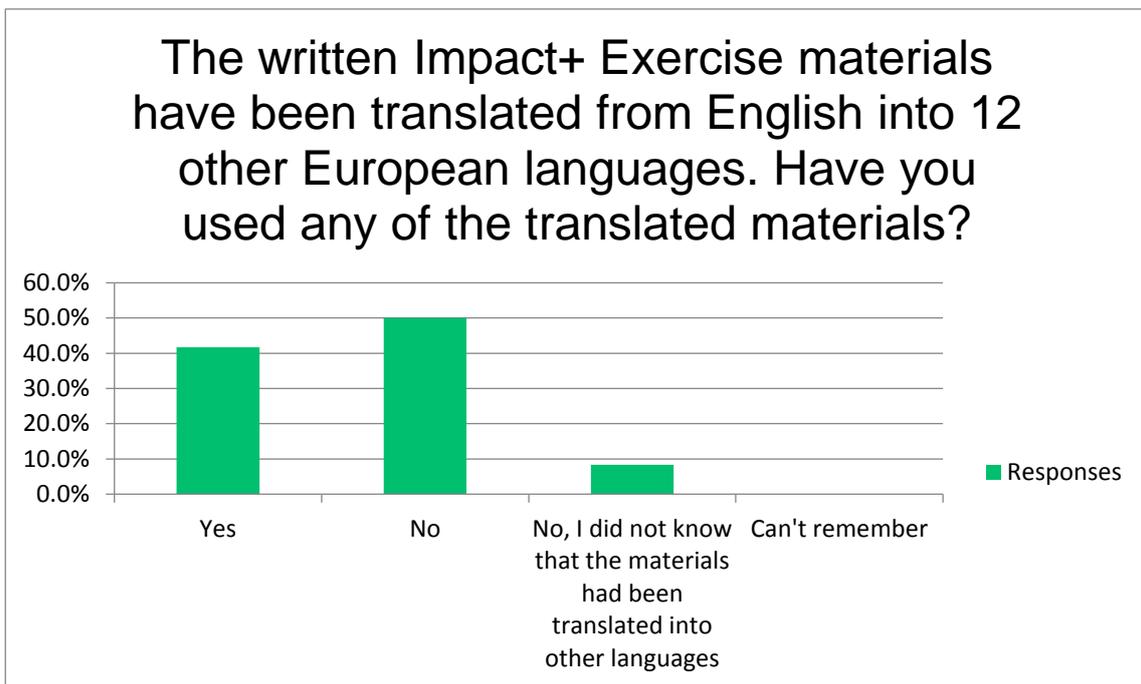
**6. Have you used the video guide for the Impact+ Exercise?  
It is available in English and with subtitles in nine  
languages.**

Answer Choices	Responses	
Yes	50.0%	12
No	45.8%	11
No, I did not know there was a video guide	4.2%	1
Can't remember	0.0%	0
	<b>Answered</b>	<b>24</b>
	<b>Skipped</b>	<b>13</b>



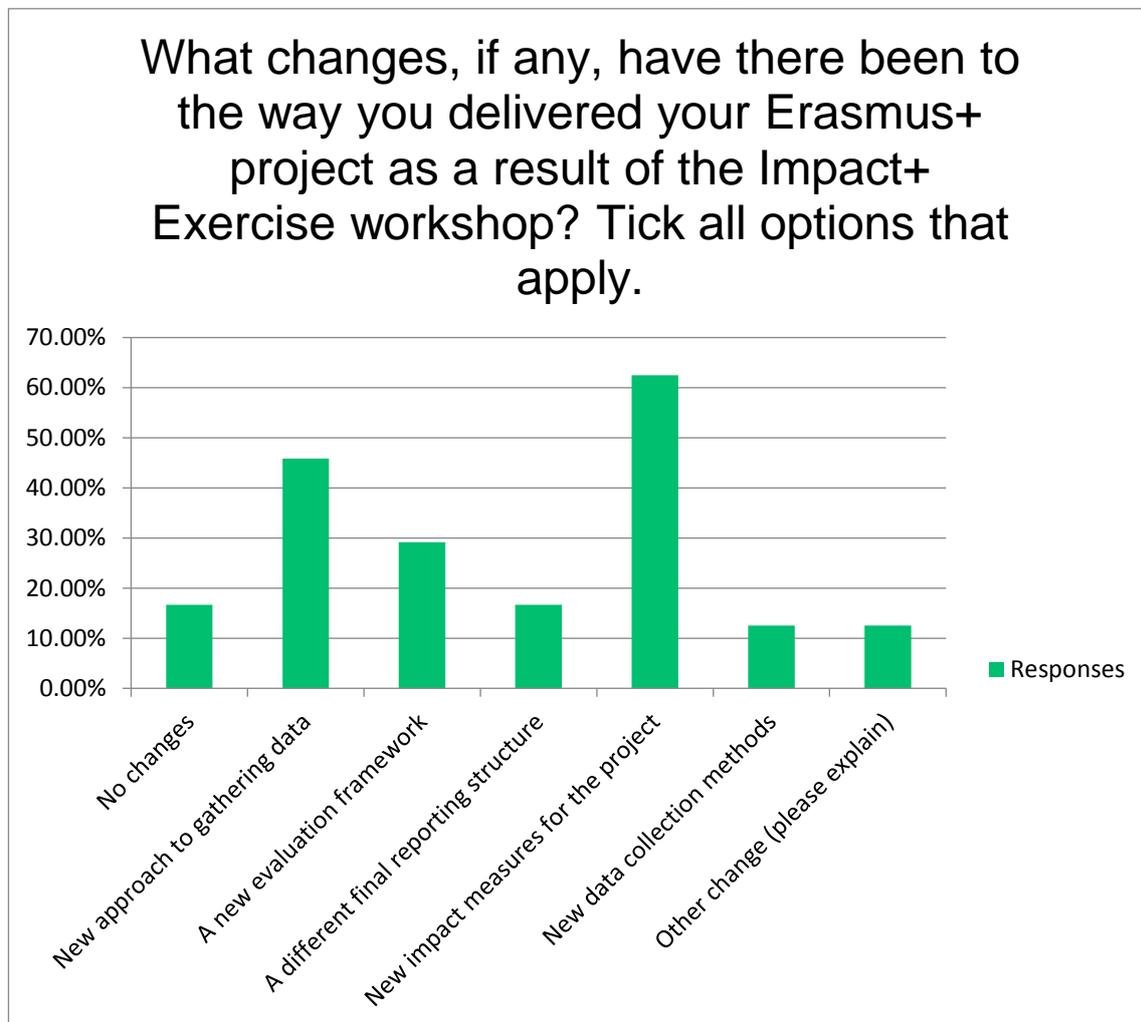
**7. The written Impact+ Exercise materials have been translated from English into 12 other European languages. Have you used any of the translated materials?**

Answer Choices	Responses	
Yes	41.7%	10
No	50.0%	12
No, I did not know that the materials had been translated into other languages	8.3%	2
Can't remember	0.0%	0
	<b>Answered</b>	<b>24</b>
	<b>Skipped</b>	<b>13</b>



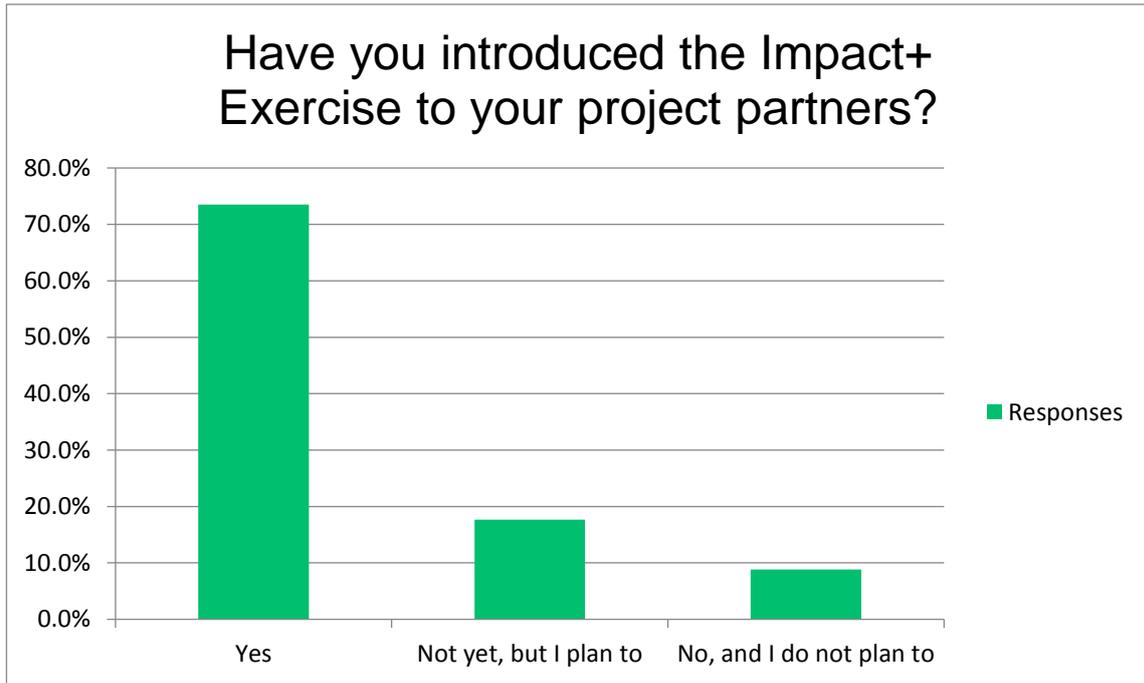
**8. What changes, if any, have there been to the way you delivered your Erasmus+ project as a result of the Impact+ Exercise workshop? Tick all options that apply.**

Answer Choices	Responses	
No changes	16.67%	4
New approach to gathering data	45.8%	11
A new evaluation framework	29.2%	7
A different final reporting structure	16.7%	4
New impact measures for the project	62.5%	15
New data collection methods	12.5%	3
Other change (please explain)	12.5%	3
<b>Answered</b>	<b>24</b>	
<b>Skipped</b>	<b>13</b>	



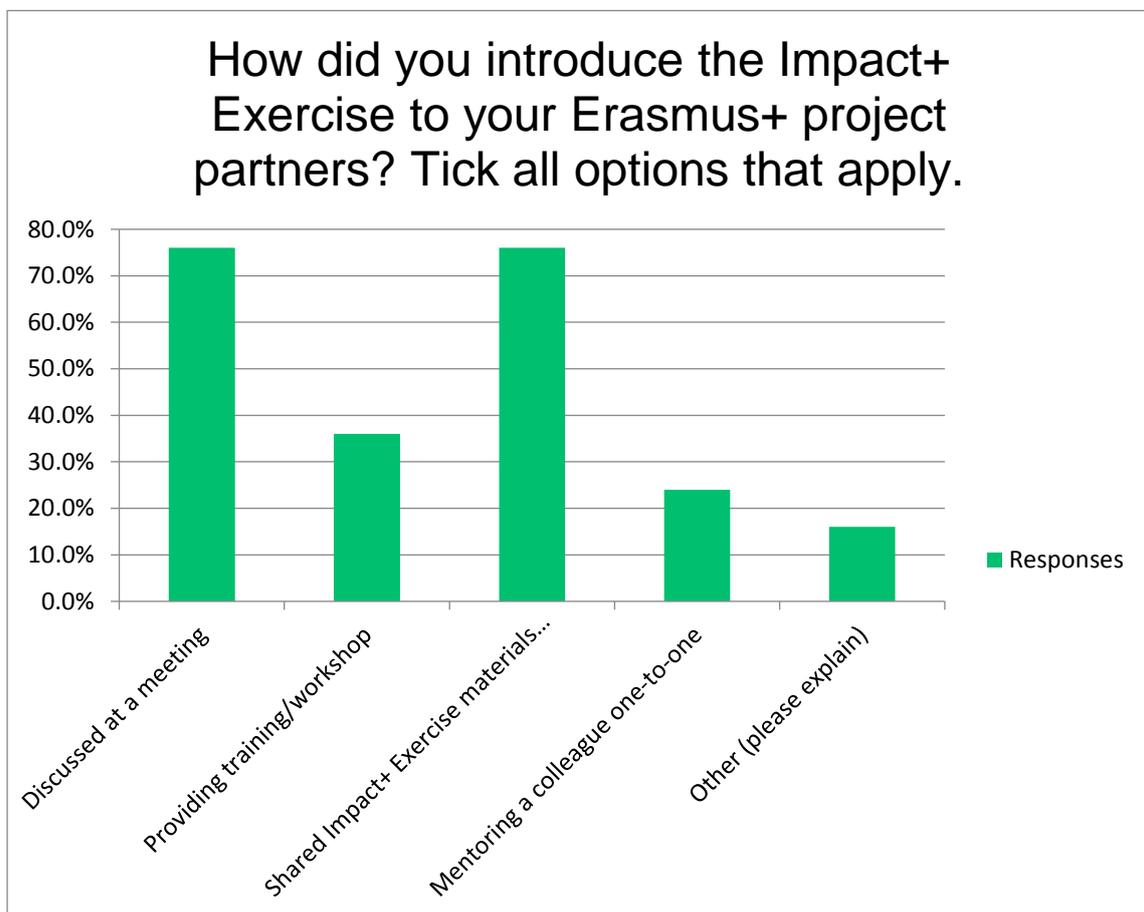
### 9. Have you introduced the Impact+ Exercise to your project partners?

Answer Choices	Responses	
Yes	73.5%	25
Not yet, but I plan to	17.7%	6
No, and I do not plan to	8.8%	3
<b>Answered</b>		<b>34</b>
<b>Skipped</b>		<b>3</b>



**10. How did you introduce the Impact+ Exercise to your Erasmus+ project partners? Tick all options that apply.**

Answer Choices	Responses	
Discussed at a meeting	76.0%	19
Providing training/workshop	36.0%	9
Shared Impact+ Exercise materials with the project team (e.g video, translated materials, workshop materials)	76.0%	19
Mentoring a colleague one-to-one	24.0%	6
Other (please explain)	16.0%	4
	<b>Answered</b>	<b>25</b>
	<b>Skipped</b>	<b>12</b>



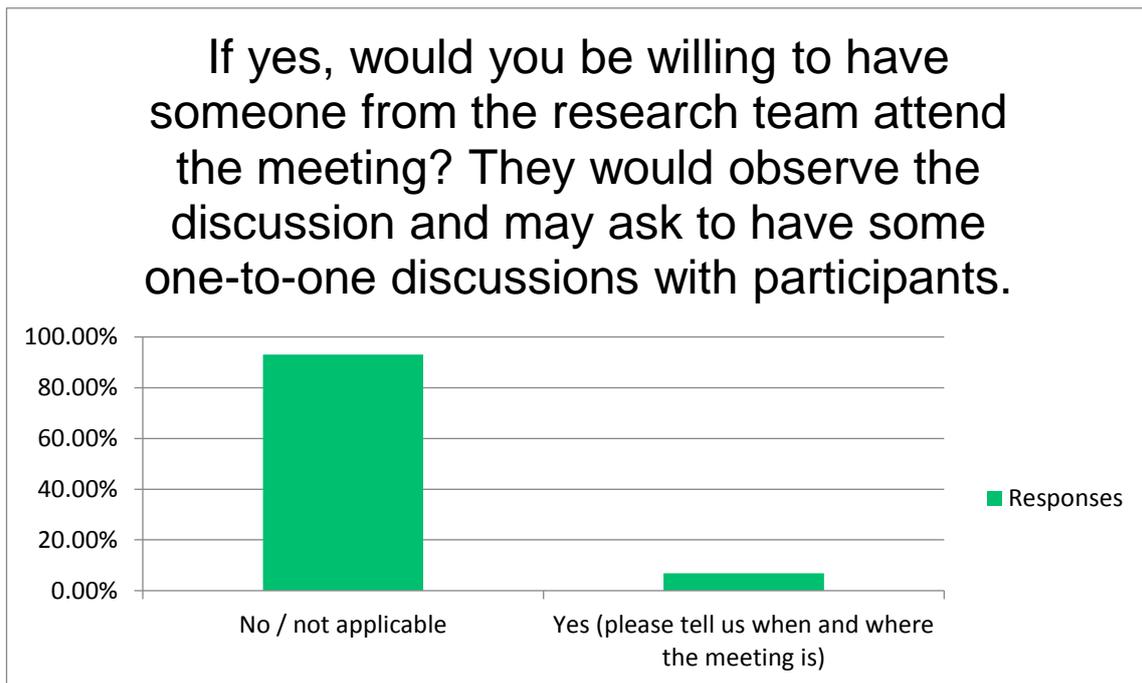
**11. Do you have a partnership meeting coming up where the Impact+ Exercise will be introduced or discussed as an agenda item?**

Answer Choices	Responses	
Yes	25.8%	8
No	74.2%	23
	<b>Answered</b>	<b>31</b>
	<b>Skipped</b>	<b>6</b>



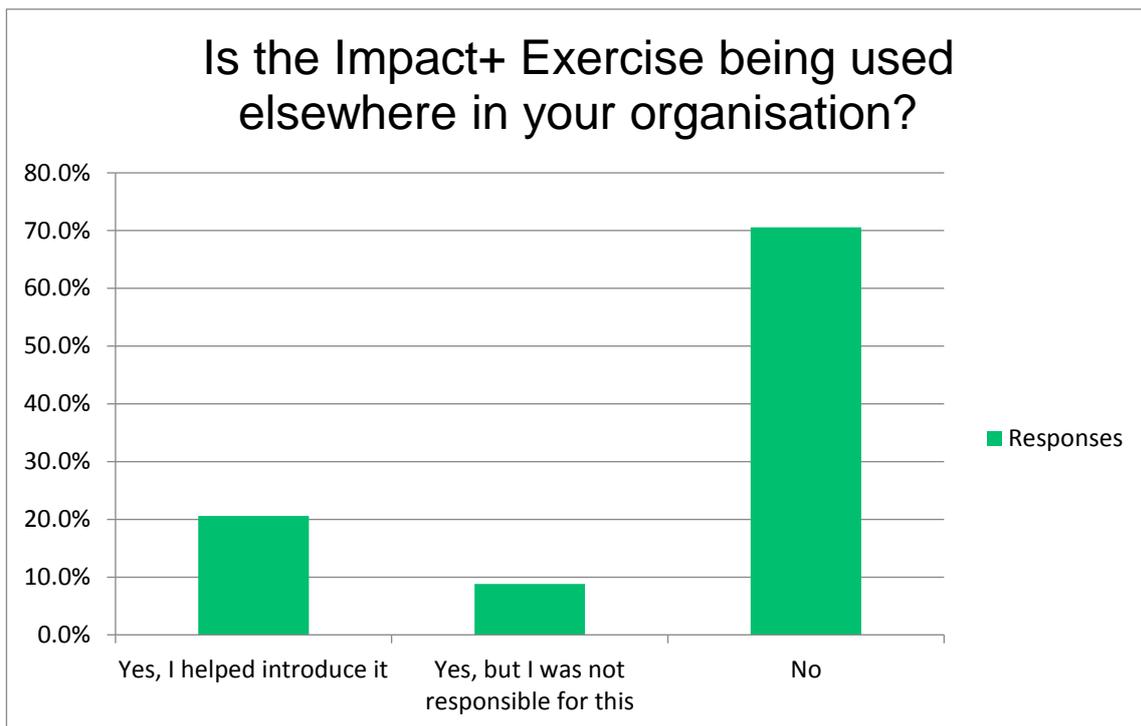
**12. If yes, would you be willing to have someone from the research team attend the meeting? They would observe the discussion and may ask to have some one-to-one discussions with participants.**

Answer Choices	Responses	
No / not applicable	93.1%	27
Yes (please tell us when and where the meeting is)	6.9%	2
<b>Answered</b>		<b>29</b>
<b>Skipped</b>		<b>8</b>



### 13. Is the Impact+ Exercise being used elsewhere in your organisation?

Answer Choices	Responses	
Yes, I helped introduce it	20.6%	7
Yes, but I was not responsible for this	8.8%	3
No	70.6%	24
	<b>Answered</b>	<b>34</b>
	<b>Skipped</b>	<b>3</b>



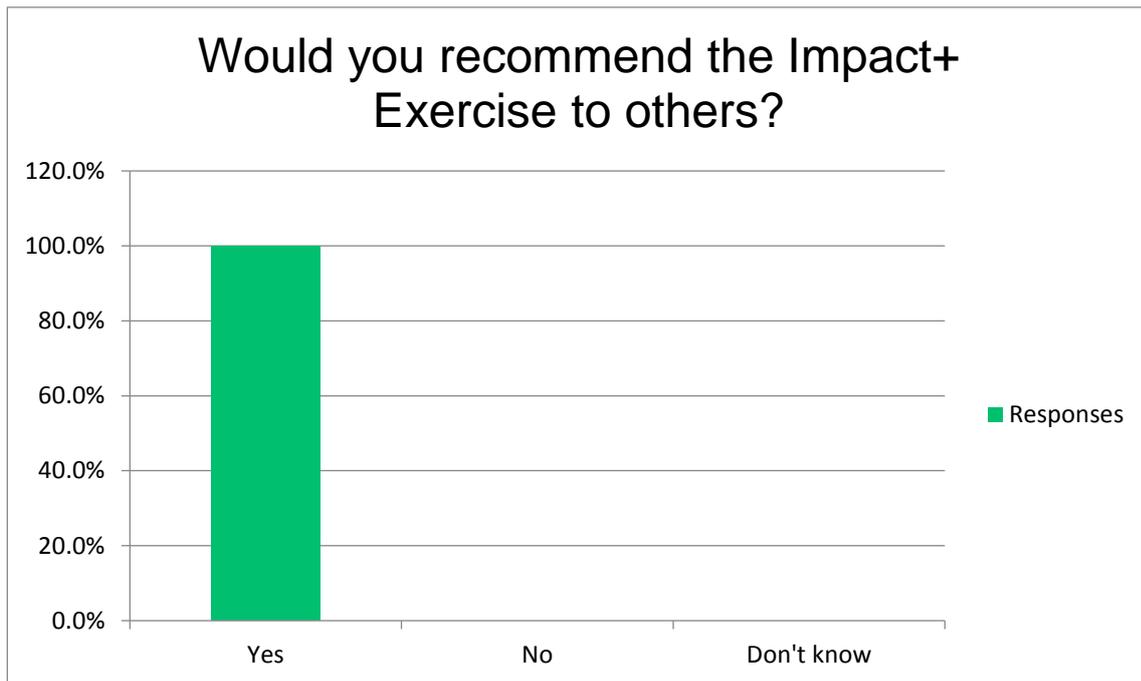
**14. In what ways is your organisation using the Impact+ Exercise?  
Tick all options that apply.**

Answer Choices	Responses	
New Erasmus+ applications	40.0%	4
Other EU funding applications	0.0%	0
Non-EU funding applications	10.0%	1
To bid for commercial contracts	0.0%	0
Exploring project impact	70.0%	7
Developing indicators	30.0%	3
Identifying data sources	30.0%	3
Helping to complete interim or final project reports	40.0%	4
Other (please explain)	10.0%	1
	<b>Answered</b>	<b>10</b>
	<b>Skipped</b>	<b>27</b>



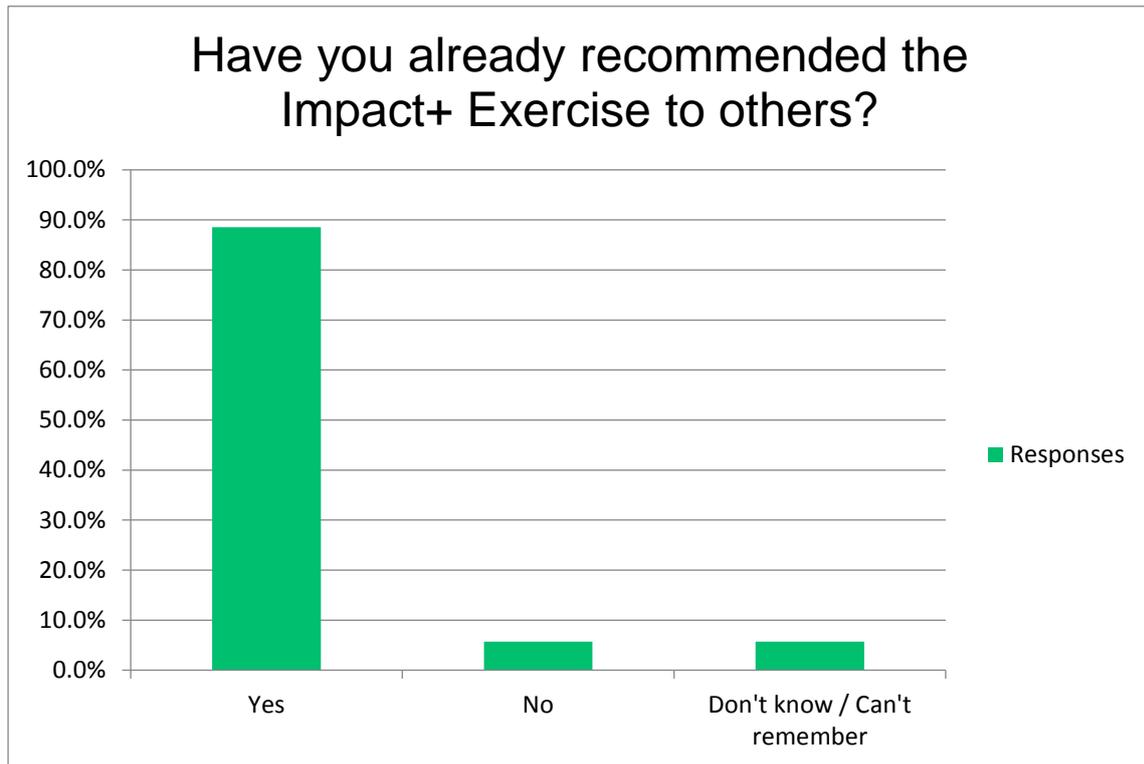
### 15. Would you recommend the Impact+ Exercise to others?

Answer Choices	Responses	
Yes	100.0%	34
No	0.0%	0
Don't know	0.0%	0
	<b>Answered</b>	<b>34</b>
	<b>Skipped</b>	<b>3</b>



### 16. Have you already recommended the Impact+ Exercise to others?

Answer Choices	Responses	
Yes	88.6%	31
No	5.7%	2
Don't know / Can't remember	5.7%	2
<b>Answered</b>		<b>35</b>
<b>Skipped</b>		<b>2</b>



## Annex C: Topic guide

### Topic guide Impact+ 2019

Follow up on their answers to date from the survey and explore further. All initial questions are for those who have used Impact+. (*The second half is for those who have not used it if we interview any in this position – go to these questions after Q3.*)

*Be mindful of the year they attended training and consider how often and for how long they have used Impact+. If they have been interviewed before, find out how they have moved on since the last interview.*

#### Introduction

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

The interview will last about 30-40 minutes if by phone/40-50 minutes if in person.

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 such as going forward as a published case study. Remember participation is voluntary.

Is it still OK to proceed with the interview?

#### Just to have a bit of a background, I would like you to briefly describe your Erasmus+ project

- Check if they are Adult Ed or Vocational Ed Training (AE or VET) from their survey and confirm?
- Confirm the date they attended
- What sector are they in – third/voluntary association/not for profit, academic, educational?
- Participants details
- What is their overarching objective?
- How many partners in which type of organisations?
- Have you got an external evaluator?

Now that I understand your project better, I would like you to think about the Impact+ Exercise workshop you attended.

#### Workshop

1. In your survey answers you identified that you found the workshop useful (check how they rated it)
  - You identified that it had helped in the following ways.....
  - Explore any personal changes for them as an individual resulting from the workshop such as their **knowledge, skills and confidence**.
  - **2018 projects** – *did you take up the offer of a follow up call to help you embed the learning? If no why not? Was this helpful? If yes how, if no why not?*
2. (For those who attended 2017) What has changed over time since you attended the Impact+ workshop? Probe on whether confidence and skills has become more embedded or if they have followed up the training in any way with further personal development
3. Discuss any changes to the Impact+ Exercise workshop they think would be beneficial

#### Impact+ Exercise and tools

4. In your survey answers you identified that.....  
Explore use of the materials from the Impact+ Exercise workshop – how and when (in what project phase) they have used them.
  - Probe on relevance, usability, benefits of using
  - Discuss any changes they may find beneficial to the workshop structure or content.
  - If they got lost or stuck somewhere find out why and how they resolved it if at all.

5. Where they have used the video guide for the Impact+, check how they have used it.
  6. Where they used the translated Impact+ Exercise materials explore how and why they used them and what languages.
    - Probe on relevance, usability, benefits of using
  7. In your survey you said you were using Impact+ for.....
    - Explore changes to the way they delivered/are delivering Erasmus+ project as a result of the Impact+ Exercise workshop.
    - What aspects of the project changed after the workshop and how, covering:.
      - Approach to gathering data
      - Evaluation framework
      - Reporting structure
      - Impact measures
      - Data collection
      -
- 7b. (For those who attended 2017) What has changed over time since you have been using Impact+ Exercise and tools. Probe on any longer term benefits in using the materials. Also probe on any issues that have come up over time and if they need any back up support further down the line.

### Partnerships

8. Discuss how Impact+ was introduced to project partners, if it has been already. What was the process for introducing them to it? Was it covered:
  - At a meeting/s (e.g. is it regular item at meetings now? Was it a one off introduction etc)
  - Training session
  - Sharing materials
  - Other
9. What was the impact of Impact+ on partners.
  - Impact on the partnership as a whole.
  - Impact on working methods
  - Impact on evaluation partner
  - Discuss wider impact up on the partnership.
  - Ask if we can contact partner organisations to interview them. Facilitate this follow up with them by getting e mail addresses, permission to contact etc.
10. Partnership meeting coming up where the Impact+ Exercise will be introduced or discussed as an agenda item. Most have said we could not attend this.
  - Check if this is still the case (for UK projects only).
  - Check other follow up options such as asking them if **they** could take photos or do some vox pops or record quotes for us to use in case studies.
  - If meeting them in person see if we can get any face to face with partner agencies.
11. (For those who attended 2017) What has changed over time since you have been using Impact+ Exercise and tools. Probe for embedding of methods, any issues that have come up and any further support required.

### Wider organisational use of Impact+ exercise and tools

12. You said you were using Impact+ in the following ways....Explore organisational context of using the Impact+ Exercise.

If the Impact+ Exercise is being used in the organisation more widely find out more about:

- how and why it was introduced
- is it being used alongside other tools or evaluation methods (which)
- has it replaced other tools or evaluation methods (which)
- what impact it is having, e.g. on data collection, evidence gathering etc.

13. (For those who attended 2017) What has changed over time since you have been using Impact+ Exercise and tools. Probe for embedding of methods in the organisation, wider dissemination, any issues that have come up and any further support required.

### Final questions

14. Are there any final comments that they would like to make about the Impact+ Exercise and or workshop?

### Not using Impact+

Only for those who answered No to using Impact+

- Explore more about why they haven't you used the Impact+ Exercise to measure the impact of your project? Was it difficult or unsuitable?
- If they have noted that their organisation currently uses another impact assessment/evaluation tools or approaches to evaluate its impact, check what:
  - Theory of Change,
  - Logical Framework Approach,
  - SROI,
  - Other: .....
- Why are they using a different approach – did Impact+ inform that decision to use a different approach, did they try it and it didn't work out, or was it taken before or by others so out of their hands?
- Check if they are **using an external evaluator, or conducting an internal evaluation?**  
If yes, where did they get them? Was the decision to appoint influenced by Impact+?

### 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.