Evaluation

Understanding Impact Through Evaluation

Aleron

Foreword

At Aleron, we are passionate about helping organisations to maximise their social impact

Nicolas Ponset

CEO & Founder

Evaluations are critical to improving the impact of programmes and interventions. Not only do they provide insight into what has been achieved by the programme, but they also give recommendations about potential improvements. However, evaluations are not often popular with those involved in them. This is because evaluations need careful consideration, planning, preparation, follow-up and analysis from those designing and implementing them and time and engagement from those being interviewed or surveyed. Evaluations can also be a long process, as they mirror the length of the programmes they relate to and require work before and after the interventions.

At Aleron, we are passionate about measuring and improving social impact, so evaluations are a core part of what we do. We are proud to have been trusted by many organisations such as The Wellcome Trust, In2research UK, The Lloyds Bank Foundation, The Nominet Trust and The Academy of Medical Sciences to evaluate some of their programmes.

We have helped them measure and maximise their impact, improve their interventions and outcomes, expand their activities and funding and select organisations and participants that most benefit from their programmes.

No matter what type of evaluation or programme, we evaluate your impact in a structured, professional and data-driven way. Our insights and recommendations will no doubt help you on your journey to maximise your impact and the efficiency of your operations.

This document outlines the steps required to achieve a successful evaluation.

Why evaluate

An impact evaluation measures the effectiveness of an organisation's intervention to change an outcome

Evaluating to improve

Any intervention can be evaluated, from an after-school programme or a new type of accommodation to a grant scheme for social tech start-ups. Impact evaluations are helpful for an organisation throughout its life-cycle. These evaluations are reflection points and can be used to plan an expansion, assess a programme, collect evidence or analyse a strategy, and they are necessary for an organisation's development and improvement.

For example, as an organisation decides to expand a programme to a new city, it must understand the circumstances that make its current work successful. What is the most effective component of the programme? How does the programme connect with the current population, and is it replicable in a new city? What initial metrics are needed to assess the impact in the new city? Is customisation required to make the programme successful?

An impact evaluation is the best way to answer these questions.

Evaluating is more than surveying

This analysis is critical to define the information, measures and indicators to be collected and analysed. Some are quantitative, others qualitative. The level of proof required will dictate the data collection approach and the complexity of the analysis. For example, the evidence necessary to decide on the continuation of a medical research programme may differ from the one required to determine whether a tutoring class should be on a Tuesday or Wednesday evening.

What you need

Robust evaluations require technical skills, resources, tools and impartiality

Technical expertise

An effective evaluation requires the skills to develop a theory of change, build logical frameworks, set performance indicators, gather and analyse data and develop insights and recommendations. This is a daunting task for any organisation that lacks time, has low staff capacity and lacks evaluation experience.

Impact evaluations bring about change, examine effectiveness, identify growth areas and ensure accountability. Organisations face multiple challenges trying to complete their impact evaluations, from effectively training staff, establishing the methodology that fits their organisation and its needs, recognising the difference between correlation and causation, identifying relevant data and creating actionable next steps. Lack of experience and practical knowledge means conducting an impact evaluation will fail to give you the knowledge you need, or worse, give you the wrong answers.

Impartial perspective

Even when an organisation can conduct an evaluation, it is missing one crucial skill - perspective. The work needs to be done with the willingness and openness to question current ways of working. An outside look at practices and policies, organisational dynamics, competitors, constituents and the sector is invaluable.

At Aleron, we see what you often cannot, offering a fresh perspective coupled with experience and expertise to conduct an effective evaluation. Our impartial view challenges the idea that the usual way is the best, that no other option is available, or that nothing can improve an outcome.
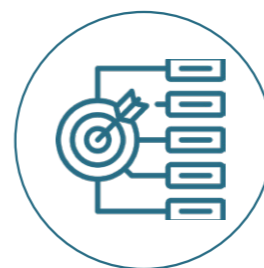
Our Process

We have developed a 5-step approach to conducting an evaluation

Project Inception

Mobilise teams and confirm objectives, define work plan and the approach to project management and data exchange.

Programme Objectives and Theory of Change

Perform initial research and co-define the programme objectives and theory of change.

Evaluation Framework and Monitoring Plan

Leverage the theory of change to develop an evaluation framework and a monitoring plan.

Data Collection

Design the data collection tools, collect data and monitor progress.

Analysis, Reporting and Insights

Analyse the data collected, develop insights and recommendations and finalise the evaluation report.

Step 1

Project Inception

The project inception is an important step to ensure that we are aligned on team roles, activities and time-lines. We will agree with the project team on how the project management (e.g. meeting cadence, reviews, sign-off meetings) and data sharing will be done during the project.

Key Activities

- Organise kick-off meeting to mobilise the Aleron and project teams

- Review/agree project objectives, time-line, milestones, key stakeholders, project management approach, detailed project plan, etc**.**

Main Deliverables

- A project initiation document that will clarify scope, objectives, team, deliverables, etc.

- A detailed project plan

Step 2

Programme Objectives and Theory of Change
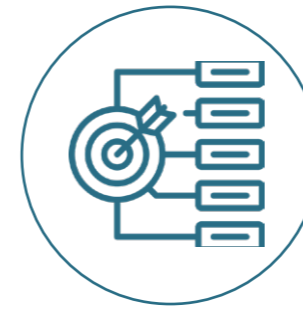
During this step we develop an understanding of the context and the desired impacts of the programme by performing research, reviewing internal documents and consulting with key stakeholders.

We typically use a Theory of Change or logic model approach to identify the issues that the programme is addressing, the intended change/impact for the target groups and how the intervention will be delivered (e.g. activities, levers and outcomes).

This exercise can be done with different degrees of engagement with stakeholders ranging from a few workshops with the programme team to a national consultation with a broad audience over several months.

Key Activities

- Review internal documents such as programme literature

- Perform research on the programme topic to understand the context, eco-system and identify other relevant initiatives and organisations

- Hold consultations with the project team and other internal stakeholders to discuss programme aims

- Co-develop a Theory of Change to articulate intended outcomes and impacts for target groups

Main Deliverables

- Report on context and objectives of the programme

- Programme Theory of Change

Step 3

Evaluation Framework and Monitoring Plan

Based on the Theory of Change, we then design key metrics used to measure impact, as well as a comprehensive monitoring plan that sets out the data collection activities during the programme. The evaluation framework details the indicators that will be used to measure the outputs and outcomes as well as the sources for the indicators (e.g. participant feedback survey, internal activity tracker).

Key Activities

- Review existing evaluation tools and assess gaps against the Theory of Change (when relevant)

- Develop an evaluation framework identifying key metrics and indicators for the agreed outputs, outcomes and impact measures

- Develop a data collection and monitoring plan for outputs, outcomes and impact measures, in collaboration with the client's project team

Main Deliverables

- Evaluation framework and key metrics

- Data collection and monitoring plan

Step 4

Data Collection

Data collection tools are designed up front based on the evaluation framework and validated with the relevant stakeholders. We use the Qualtrics survey platform to build and distribute surveys, to ensure good user experience and high engagement. Throughout this step, it is critical to continue to meet regularly with the project team, monitor progress (e.g. interviews scheduled and delivered, survey response rate) and mitigate any potential issues and risks.

Key Activities

- Design data collection tools (e.g. survey questions, interview scripts)

- Build and distribute surveys to programme participants and other relevant stakeholders, and monitor survey responses

- Conduct semi-structured interviews with programme participants and other relevant stakeholders (Option)

- Provide regular updates on data collection progress to the project team

Main Deliverables

- Data collection tools

- Primary datasets, including raw survey data and interview transcripts

Step 5

Analysis, Reporting and Insights

In the final step, we conduct quantitative and qualitative analyses of the collected data, and collate findings in reports on an annual basis. The level of complexity of the analysis and the methods used is adapted to the datasets and the level of evidence required. When possible, our team is looking for causality between data sets and uses advanced analytic techniques (e.g. machine learning algorithm) to obtain the required insight to support our recommendations and the organisation's decision making.

Key Activities

- Analyse primary data (quantitative and qualitative)
- Write interim and final reports with key findings and recommendations
- Present interim and final findings to the project team and other key stakeholders
- Refine evaluation framework, monitoring plan and data collection tools where necessary

Main Deliverables

- Interim and final reports
- Summary presentations
- Updated evaluation framework, monitoring plan and data collection tools

Communication

The communication of the results needs to meet the audience's expectations in terms of format and content

Programme Evaluation
2023

Here are some important considerations when communicating an impact evaluation:

- **Audience:** Tailor the communication to the specific audience you are addressing. Different stakeholders (e.g. policymakers, funders, practitioners and the general public) may have varying levels of expertise.

- **Clarity of Objectives:** Clearly state the objectives of the impact evaluation. What are the research questions or hypotheses being tested? This will help the audience understand the purpose and focus of the evaluation.

- **Methodology:** Explain the evaluation's methodology clearly and concisely. Describe the data collection methods, study design (e.g. randomized controlled trial, quasi-experiment, observational study) and any limitations or potential biases.

- **Results:** Present the impact evaluation results in a transparent and understandable way. Use charts, graphs and other visual aids to enhance comprehension.

- **Limitations:** Acknowledge the limitations of the evaluation, including any potential weaknesses in the methodology or data. This helps maintain transparency and sets appropriate expectations.

- **Comparisons:** If possible, compare the results of the impact evaluation with other similar studies or interventions. This can provide additional context and insights into the effectiveness of the program being evaluated.

- **Accessibility:** Make sure the communication materials are easily accessible to the intended audience. Use various formats such as reports, executive summaries, infographics and presentations to cater to different preferences.

Data Analytics and Data Visualisation

We use the most advanced data analytics techniques and practices to draw insightful conclusions including statistical and behavioural analyses, economic modelling and machine learning algorithms. We typically take a mixed-methods approach to data collection and have found that the best insights are achieved when combining results from multiple data sources. However, we know that it is important to ensure that our data collection methods and engagement are streamlined to avoid overburdening participants and minimising survey fatigue.

When presenting results, we pay significant attention to the way we communicate insights and use the most appropriate graphics and infographics.
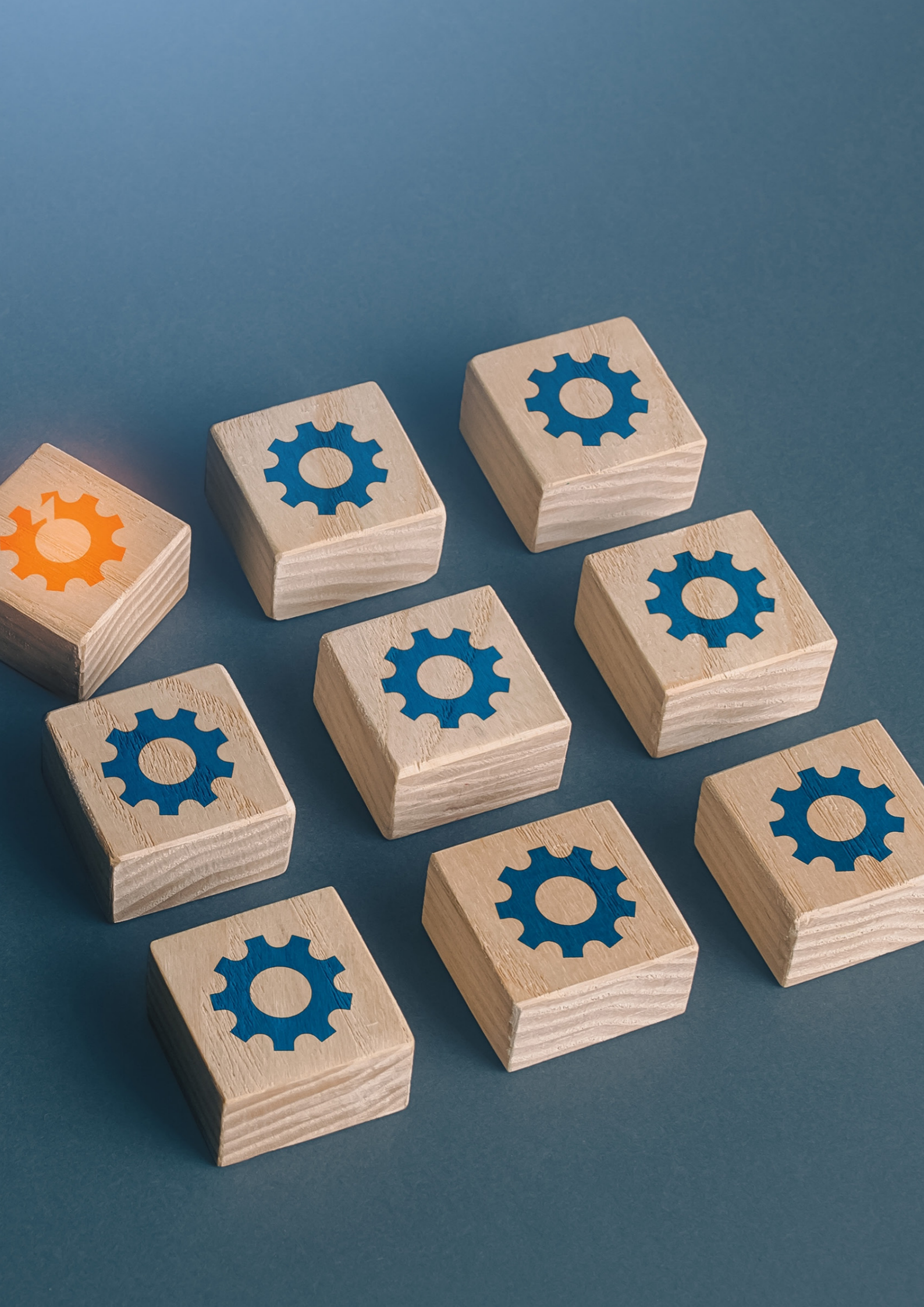

auticon

LHA

Case Study: The National Lottery

Multi-year evaluation of a national social care scheme

Aleron was commissioned by the National Lottery and Lloyd's Bank Foundation to lead an independent multi-year evaluation for a national social care scheme: Homeshare. As part of this work, we undertook a number of activities.

Aleron Identified a range of appropriate data indicators - including demographic, lifestyle and contextual - and developed a robust data collection framework. The framework was developed using a co-production methodology that combined external best practice with information about feasibility and site working practices.

Using national datasets including census, deprivation indices and house price levels, analysing down to a Middle Layer Super Output Areas (MSOA) level and working closely with eight independent delivery sites, we designed a data collection tool and analysis methodology.

Aleron produced programme reviews and designed data and visualisation tools to report key findings to programme sponsors and leadership at regular intervals throughout the evaluation process.

Case Study: auticon

Evaluation to inform the impact report of a technology company

Autistic adults often have extraordinary cognitive and technical abilities, yet many find it difficult to secure or maintain mainstream employment. auticon recognises this situation and is the first international enterprise to exclusively employ autistic adults as consultants, offering a range of services from analytics and software testing through to compliance and security. After a number of years of successful operations, the organisation was keen to improve their approach to impact management and develop a consistent process for defining, measuring and reporting impact, with a goal to publishing a social impact report.

Aleron trained the auticon team on impact management and measurement, worked collaboratively with their teams to co-design their Theory of Change for both auticon UK and auticon Global, and implement robust and lean impact management processes. We trained staff across the world, from Germany and the UK to Australia and the USA, on quantitative and qualitative research methods, informing their global impact measurement and reporting. The project also designed a long-term impact strategy and measurement framework, including a range of bespoke data collection tools for the UK and Global teams.

Each year since February 2019, auticon UK and now auticon Global have successfully measured and managed their impact and communicated it via their impact report, which has been widely shared both internally and externally, including to their staff, clients and investors. Their first report received such excellent feedback that they have since been short-listed for multiple UK Social Enterprise Awards in the 'Prove it: Social Impact' category.

Case Study: FLIER Programme

Evaluation of leadership development programme for senior healthcare professionals

The FLIER (Future Leaders in Innovation, Enterprise and Research) programme was launched by the Academy of Medical Sciences in 2018, with the aim to support the development of future leaders, who can create collaborations that drive innovation across academia, industry, the NHS and government. The two year FLIER programme combines a unique blend of activities, including mentoring, workshops and a cross-sector project.

Working closely with Academy staff and external stakeholders, we developed an evaluation framework that defines the key metrics used to measure the FLIER programme outputs and impacts. We also developed a detailed multi-year monitoring plan that lays out the necessary data collection activities, including regular surveys with participants and their employers, interviews with a selection of participants and continuous tracking of direct outputs of the programme. Each year, we analysed the resulting data and presented insights in evaluation reports.

Our evaluation describes the positive impact that the FLIER programme has had to date. With our evaluation measuring outcomes across different time-scales, we were able to evidence the causal link between the programme and the desired long-term impacts of developing future leaders. Findings have been presented to the Task-force of the programme and have helped to inform and shape future programme development.

Case Study: The Wellcome Trust

Evaluation of a mentoring programme for early career researchers

In 2020, The Wellcome Trust published a report on research culture which highlighted concerns about job security, lack of support and low career satisfaction. To address these challenges, the Wellcome Trust launched the Broadening Horizons mentoring programme, which aims to support early-career researchers with an interest in translational research. We were commissioned to evaluate the pilot programme, to demonstrate its impacts, helping to build a business case for future support and self-sustainability.

We first developed a Logic Model for the programme, through consultations with stakeholders from participating organisations and an extensive landscape review of mentoring programmes in academia. The Logic Model defined outcomes for participating mentees and mentors, as well as wider organisational change in participating institutions.

Following the design of the Logic Model, we developed an evaluation framework and a monitoring plan for data collection. For this evaluation, we established a baseline 'distance travelled', by measuring outcomes for a control group of comparable researchers that did not participate in the programme. Findings were presented in an interim and final evaluation report for the pilot cohort.

Case Study: Nominet Trust

Multi-year evaluation of two social tech funds

For 25 years Nominet have been operating at the heart of the internet infrastructure as guardians of the UK domain name registry. In 2008 Nominet launched a charitable foundation, the Nominet Trust, and contributed some of its profits to it. The Trust - now called the Social Tech Trust - is the UK's leading dedicated investor of socially motivated technology.

Since 2008, Nominet have supported over 300 social ventures in the UK and provided more than £30m of funding to transform lives with tech. Through this work, Nominet have played a vital role in developing the social tech ecosystem and have built an extensive track record of successfully supporting social tech ventures to deliver financial and social returns.

Aleron was engaged to assess the impact of their investments. We designed an evaluation framework and collected a blend of qualitative and quantitative primary data (through in-depth interviews and online surveys) to understand the end-to-end grant management process, as well as the perceptions and experiences of grantees. We provided the Trust with a detailed evaluation report with targeted insights, including measures of social impact and common project success factors and practical recommendations to improve the effectiveness of their grants. The report was widely shared with internal and external stakeholders and was well received by the Board of Trustees. Our key findings informed and shaped future strategic planning and programme development, based on Aleron's assessment of grantees' need for development and tailored support to grow.

Support

We bring a unique set of expertise, methodologies and tools to effectively conduct evaluations.

We recognise that while most organisations understand the principles of evaluation, some find it challenging to define and implement a robust and impartial process. Aleron's specialist consultants work with organisations to support them in conducting external evaluations, leveraging our experience in engaging with various stakeholders and our proprietary evaluation tools and frameworks. Together, we develop theories of change, evaluation frameworks and data collection tools to produce meaningful insights and actions. Our robust and tailored process ensures that you identify what matters most to you and your stakeholders and develop insights that help you achieve your ambitions.

Aleron

Aleron was established to bring a new approach to creating positive and sustainable change

About Us

In 2010, Aleron was established to bring a new approach to creating positive and sustainable change around the world. After over a decade of working in social impact and sustainability, we have seen the incredible benefits carefully targeted action can have on society and the environment and how to make sustainable change happen at scale.

We actively partner with our clients to co-create strategies and capabilities that deliver positive and sustainable economic, environmental, and social impact. No matter the industry, Aleron helps organisations define and achieve their purpose.

Through our work we have enabled critical advances in medical research, build resilience in local vulnerable communities, accelerate investments towards alternative ways to generate electricity or guide organisations to achieve net zero emissions.

Collaboration is key to tackling complex social and environmental challenges. At Aleron, we believe public, private and non-profit actors must work together to be effective forces for good. We work across sectors, bringing public bodies, corporates, non-profits, social enterprises, foundations and investors together to address and achieve the UN's Sustainable Development Goals (SDGs).

Our Services

Purpose

Stating your intended contribution to our society and planet

The purpose of an organisation is the very reason why the organisation exists —beyond simply making a profit. Purpose gives direction and informs your decisions and culture.

Leveraging over 12 years of experience in social impact and sustainability, our approach helps you clearly define your purpose and embed it in your organisation and decisions.
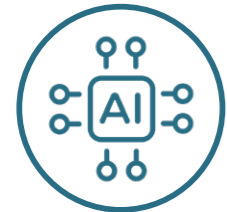
Research

Generating the insight required to develop impactful strategies

Our team brings unique expertise in primary and secondary research, data analysis, and real-world experience to identify solutions to complex social and environmental issues. We use a combination of surveys, interviews, focus groups, data collection and site visits to conduct our primary research. Our analytics team leverages the latest techniques and tools in machine learning and generative AI to generate actionable insights.

Strategy

Developing impact and ESG strategies to create social value and achieve your purpose

We provide insight to stimulate thinking, generate new ideas and guide our clients towards making the right ESG strategic choices. Beyond our research capabilities, we offer a wide range of proprietary tools and services that support every element of strategy development. Our reputation for collaborating with clients to achieve exceptional results is unmatched in the social impact and ESG industry.

Transformation

Building the capabilities to drive action, and accelerate impact

We help organisations identify their potential for ESG transformation through a proprietary suite of diagnostics and tools. With this informed evidenced-based view, we work with our clients to design and implement the operating models, capabilities and ways of working they need to deliver their strategy and purpose. Our transformation approach follows an agile model to ensure rapid and realistic change.

Impact

Evaluating and communicating the impact of ESG initiatives

Our team brings extensive experience in social impact and ESG reporting, including social return of investment (SROI), health economics including QALY, impact evaluations and sustainability reporting standards (SECR, ESOS, SASB, SFDR, etc.) We help you gain the insight to make ongoing informed decisions about your purpose, strategy and operations.

Funding

Raising and investing funds to implement ESG and impact strategies

Because of our corporate finance and investment banking heritage, we are passionate about supporting the growth of the sustainable investment market, from helping entrepreneurs to raise capital from impact investors, and embedding ESG practices in private equity to designing social impact bonds.

Training

Building the knowledge and skills to drive an ESG agenda

Leveraging our on-the-ground experience and conscious of the need for greater workforce development across the sector, we offer bespoke training support across the ESG spectrum from culture and DEI assessment, social impact measurement to decarbonisation and carbon emission life cycle analysis.

Areas of Expertise

Since our inception, we have worked on some of the most pressing sustainability issues

No Poverty

Fair4All Finance was founded to help the financial wellbeing of people in vulnerable circumstances. We co-designed a strategy with the team and sector professionals to improve access to affordable credit, and more recently developed a theory of change on financial inclusion in the UK.

Good Health & Wellbeing

We have worked with many healthcare and medical research organisations helping them deliver the best outcomes for the communities they target. Notably, we worked with Cancer Research to develop the operating model and capabilities required to realise their ambitious research strategy.

Quality Education

We supported the University of London in transforming their online education provision through the redesign of its operating model including the embedding of new capabilities in business development, course design and student services.

Gender Equality

We worked with the Ignite partnership - a charitable initiative to support greater diversity and inclusion in motorsport launched by Mercedes-AMG Petronas F1 Team and Sir Lewis Hamilton in UK motorsport including gender equity.
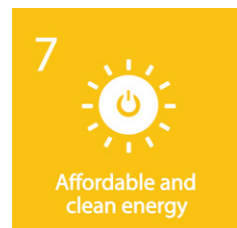
Affordable and Clean Energy

We have assisted a start-up that invented a solution to convert air into electricity to developing their strategy and raise the investment required to build a large-scale prototype.
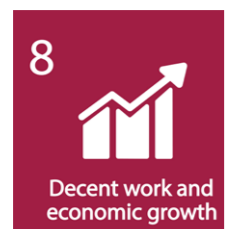
Decent Work & Economic Growth

We co-produced a digital product to support disadvantaged young people in employment with the Prince's Trust. Our work was informed by a youth board we established to develop ideas through the discovery phase.

Industry, Innovation & Infrastructure

We have supported the Global Innovation initiatives launched by Bloomberg Philanthropies, by developing a performance framework, we help them communicate and improve the overall impact of the programmes, including What Works Cities, i-Teams and Mayors Challenge.

Reduced Inequalities

Following the British Red Cross' development of their 2030 strategy, we worked with the NGO to design a new operating model to support its work to provide practical, local and emotional support to people in need throughout the UK.

Sustainable Cities & Communities

Our Parklife is a social enterprise that was set up to support the regeneration of Queen Elizabeth Olympic Park in London. We have worked with the team and Engie - a French multinational utility company - to develop a growth strategy to become financially sustainable.

Responsible Consumption & Production

Our multi-staged methodology allowed us to map out the sector-wide issues and navigate through this complex space, focusing the strategy on the areas where Esmée had the greatest opportunity for impact.

Climate Action

We have helped Jisc – a leading technology provider to the education sector - to implement their CSR strategy, assess climate risks and embark on their journey to net zero. More broadly, we have been active climate advocates through our research activities and participation in climate initiatives.

Life on Land

Aleron has been involved with numerous national and global animal welfare organisations, including Brooke, Woodgreen and World Animal Protection. We assisted them in a range of areas, from strategy development and impact measurement to process improvement.

Get in Touch

To find out more about what we do visit our website
www.aleronpartners.com

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