OPEN Fact Sheet: Design – Steps to plan your outcomes measurement approach

This quick guide is part of a suite of technical resources developed by OPEN on behalf of The Centre.

For more resources, go to www.outcomes.org.au

OPEN Fact Sheet: Design – Steps to plan your outcomes measurement

What is it?

Measuring outcomes helps organisations to test what they are doing and the difference they are making, learn whether or not it is working, and continuously improve to have even greater impact.
This test, learn and improve process can improve service design and delivery, drive innovation and support organisations to engage funders and the people they are working with.

There are many purposes for measuring your outcomes. These include:

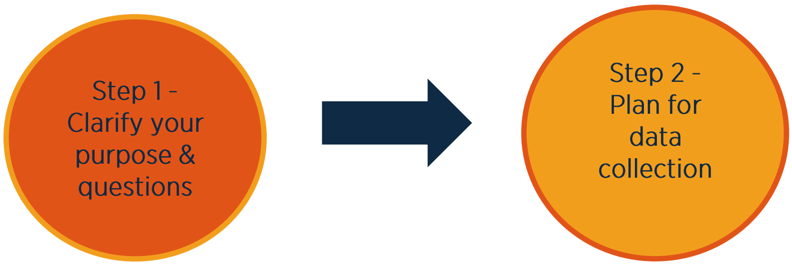
- Improving your program through defining how your program will work, collecting data as you go and using your learning to adapt and improve
- Building client participation into your design and evaluation processes
- Understanding you are making a difference, clearly communicating that difference and the value of your program to others
- Demonstrate accountability and make a stronger case for additional funding to decision makers
- Contribute to the knowledge base to be shared with colleagues and the sector.

Outcome measurement is underpinned by the use of evaluation tools. There are many different evaluation approaches driven by purpose, complexity, type and amount of data required, involvement of stakeholders and underpinning values. These can examine any size of intervention, from small projects to large scale cross organisational strategies and should consider design, delivery processes and along with outcomes and their measurement.

A note on terminology: Evaluation can be defined as the systematic collection of information about the activities, characteristics, and outcomes of programs to make judgements about the program, improve program effectiveness, and/or inform decisions about future programming[1].

[1] Patton, M. Q. 1997. Utilization-focused evaluation: The new century text. Thousand Oaks, CA: Sage.

As introduced in the **Quick Guide: Design 2** , there are two key steps in planning your evaluation approach.



Getting started

Below, we take you through each step in more detail, and provide tips to keep you on track.[2]

Developing an outcome measurement plan will help you determine if your program has achieved its intended outcomes over the short, medium and longer term. You have defined these intended outcomes and what you propose to deliver to achieve them in your program logic. Measuring your outcomes enables you to demonstrate progress towards or achievements of outcomes, test and refine your program logic and understanding of what works, for whom and when, and how this can be improved.

Planning for outcome measurement – the basics

Consider the questions:

1. What is the **key intended purpose** for measuring your outcomes and what resources do you have to support this?
2. **Who are the key users** and what would make your reporting of your results useful to them?
3. **What are the key evaluation questions and sub-questions to meet your needs** – most commonly, key questions will be 'did we fulfil our objectives and deliver expected outcomes', with sub-questions asking 'To what extent did we achieve each high level outcome in our logic.'

[2] For simplicity, we focus on the program level. Planning for smaller scale activities, such as clinical service delivery, can use similar key questions and processes but these may not be documented as formally or involve the same degree of collaboration with others.

Quick tips to clarify your purpose and evaluation questions:

Keep it simple. Only focus on your most important needs, those that will contribute to decision making – the 'must have', not 'nice to haves'.

Key users are likely to be your team but might also include steering committees, senior management or leadership, funders or delivery partners. Focus your efforts to meet the needs of your key users and the type of information and report style that they prefer. It is worth engaging your key users about these expectations.

Identify your key evaluation questions to help simplify and focus your effort. Your evaluation questions are the organising themes for your investigation. You will also create a series of sub-questions connected to these. Sub-questions draw on your program logic to ask whether each expected outcome was achieved. For example - *'To what extent, did the program deliver Outcome 1/2/3'.* Another common sub-question could be *'To what extent was the program delivered as intended, what worked and what didn't and for who'.*

√ Take a look at the OPEN Template: Design - Outcome Measurement approach for examples of sub-questions under each of the above questions, and a worked example.

√ Also check out the OPEN Fact Sheet - Common Evaluation Questions as another good place to get an idea of possible evaluation questions.

Step 2 -
Plan for data collection

Consider the questions:

1. What data is needed to answer your questions, what is already available and what needs to be collected?
2. What data collection tools, procedures and timelines are needed?
3. Who will be responsible for collecting data and how will they be supported in this task to ensure data is collected consistently?
4. How will data be stored and analysed? Analysis will be easier if data is available electronically.

Quick Tips to consider for data collection:

Data selection will be driven by the questions you need to answer. Aim to keep your approach simple and straightforward, as your approach becomes more established you can explore more sophisticated methodologies.

- What data or data collection tools are already available? Save time and effort by seeking out data that you already collect or can adapt such as service usage or performance reporting data, client feedback surveys, case notes, Practitioner reflection journals, data from partner organisations or government agencies.

Consider who might know the answers to your questions; if you need to know how the program has benefited clients, then they are one source of important information.

- Use existing surveys or validated survey tools, which offer a reliable method to assess changes for clients overtime, including changes in attitudes, experiences, social, cognitive, emotional, physical and clinical symptoms and functioning.
- Using multiple and different types of data will make your findings more reliable and persuasive. You should use both quantitative (numerical) data and qualitative (descriptive) data. Quantitative data includes counts, proportions, averages and percentages. Qualitative data involve gathering narratives of experiences and perceptions from clients and stakeholder to explain patterns observed in your numerical data and gain deeper insight into experience and differences of outcomes and their causes.
- Ethics and informed consent. If you are collecting information for an evaluation purpose you will need informed consent from participants and you may need formal ethics approval. This is important to ensure no harm is experienced by participants and that their rights, interests and privacy are protected.

Take a look at:

√ OPEN Fact Sheet – Getting started with data collection for more on how to identify what data you will need, build it reliability through using mixed methods and identifying data collection methods that might work for you.
√ OPEN Fact Sheet – Using validated outcome tools for more on validated outcomes tools and which ones might work for you.
√ OPEN Fact Sheet – Considering Ethics and OPEN Tool – Consent forms templates for more on how to undertake your outcome measurement processes ethically and whether you may need formal ethics review processes.

Getting going - How to go about your outcome measurement planning process

- Make outcome measurement work for you – your efforts will be more successful if you consider your team's needs and how your efforts can show what your program has achieved and how you can continuously improve.
- Remember to keep it simple – your intent should be to improve your evidence, it does not have to be perfect. This does not require complex research design. Start systematically collecting basic information about your delivery activities and their effects on clients. You can build up your approach over time.
- Developing your Outcome Measurement/Evaluation Plan, if possible, as a group activity – you should work through the planning process with your project team and key managers or stakeholders. Many outcome measurement/evaluation plans are never

implemented because they do not have management commitment or are too time consuming for those responsible for doing the work.

- Establish your 'outcome measurement' team with clear roles and responsibilities – make sure someone is responsible for managing delivery of the plan and troubleshooting key work. Obtain expert advice from your organisation's research team, people in your organisation with experience in research, or contact the team at OPEN for free advice on the phone.

For getting started

Further resources are forthcoming on the topics below

- The OPEN Tool – Template – Outcome measurement planning template. This will help you capture key components of your outcome measurement or evaluation plan and take you through key evaluation questions, relevant information and potential data sources.
- OPEN Fact Sheets – Common Evaluation Questions, Data collection options, Validated measurement tools and Ethics considerations.

What are some other tools that could help?

Designing a Program Logic	
The Australian Institute of Family Studies practice resource https://aifs.gov.au/resources/practice-guides/planning-evaluation	This resource provides detailed guidance on developing an evaluation plan for programs within the child and family services sector and includes Sample Evaluation Plans. It provides technical detail without being overwhelming.
The TasCOSS How to Library - https://www.tascosslibrary.org.au/	The TasCOSS 'How To' Library provides short, easy to understand instructions to assist community sector organisations and individuals to meet Outcome Measurement reporting requirements.
NZ Social Policy Evaluation and Research Unit (Superu) – Making sense of evaluation: A handbook for everyone https://www.dpmc.govt.nz/sites/default/files/2018-03/Evaluation%20Handbook%20Dec%202017.pdf	This resource is designed for agencies to improve understanding of measuring effects of programs and initiatives. It provides an overview of concepts and processes in plain English, with additional resources provided for further reading.
Better evaluation https://www.betterevaluation.org/getting-started	Better Evaluation is a global collaboration aimed at improving evaluation practice and theory. The site includes each step of the evaluative process, with tools and instructions.