UNDERSTANDING YOUR IMPACT:
A GUIDE

JULY 2019

J R McKenzie
Trust

POINT
& ASSOCIATES

Introduction

Doing better, together.

The JR McKenzie Trust has developed this resource to help ngā kaikōkiri/grantees describe the difference they are making in their communities and to support them in their development journey. It may also help organisations gather data kaikōkiri/ grantees need for a Statement of Service Performance required by Charities Services.

This resource is designed to be easy to use and support organisations to learn about themselves. It is based around a survey which can be done online or on paper, but it also has information about other methods such as focus groups and interviews. It includes templates for a one-page "Impact Assessment" plan and report.

What an impact assessment involves

An impact assessment will produce information about three things:

- **Connections**: who you reached
- **Activities**: what you did
- **Impact**: the difference you made

This resource describes a process and methods for collecting information about and reporting on those things.

Contents

1. Change statement

What is a change statement?

A change statement is a description of who you want to work with, what you want to do, the impact you want to have and the wider social change you want to contribute to.

We want to work with _____ **by** _____ **so that** _____.

Therefore, we expect to contribute to _____.

Your original funding application to the J.R. McKenzie Trust included your change statement.

EXAMPLE CHANGE STATEMENT: Safe and Sound Housing

Safe and Sound's change statement says:

We want to work with women and children who have experienced family violence **by** providing safe housing after referral by community partners (e.g. Police, Women's Centre, Hospital, Marae) **so that** the women and children can live in a safe place while they make longer-term arrangements. **Therefore, we expect to contribute to** a reduction in the rates of family harm in Hilltown and Treeville.

Your change statement will help focus your impact assessment. Once you write your change statement you will be ready to progress to the next stage of developing your impact assessment plan.

2. Focus your assessment

What your impact assessment should collect information about

Your change statement will describe the information you need to collect about:

- **Connections**: who you reached
- **Activities**: what you did
- **Impact**: the difference you made

This information will be useful for you and your organisation to understand the progress your organisation is making towards achieving its goals. Below is an example of how a change statement and those three points help focus an impact assessment.

EXAMPLE IMPACT ASSESSMENT: Safe and Sound Housing

Safe and Sound's change statement says:

*"**We want to work with** women and children who have experienced family violence by providing safe housing after referral **by** community partners (e.g. Police, Women's Centre, Hospital, Marae) **so that** the women and children can live in a safe place while they make longer-term arrangements. **Therefore, we expect to contribute to** a reduction in the rates of family harm in Hilltown and Treeville."*

Like all impact assessments, Safe and Sound Housing's impact assessment is based on their change statement.

1. Working with: who did we reach?

- How many women used our emergency housing? How many children? Who is making referrals?

2. By: what did we do?

- What did we do for the people we sheltered? What worked well? What didn't work as well? What would we do differently next time?

3. So that: what difference did we make?

- What difference did we make for the people we sheltered? What difference did we make while they were with us? And what about over the longer-term? Were these impacts different or the same in both S&SH locations, i.e. Hilltown and Treeville?

3. Cultural considerations

The Treaty of Waitangi has three principles that are often referred to as a guide for relationships between Māori and the Crown. The Treaty's principles can also be very useful as a guide for respectful relationships in evaluation.

Protection

Protection means actively protecting Māori knowledge, interests, values, and other taonga. In an evaluation context, we need to be mindful that the evaluation process and outcomes will protect the interests of everyone involved. For example, new migrants may be concerned that if they give negative feedback about a service, they will lose their entitlement to that service. Another example is that women who have experienced family violence can be concerned that careless reporting by evaluators – or other people recording information about them – will reveal their whereabouts. Evaluators need to be very clear how their process will protect people's interests.

Partnership

Partnership involves working together with Māori to develop strategies. Partnership is about doing things together, working collaboratively and deciding on an agreed approach. So if your organisation is including a consultant to lead or support your impact assessment process, the consultant should be doing that alongside a widely trusted and knowledgeable person/people from your organisation and members of the community. Trust and respect are essential. Without it, a study cannot collect good information from a diverse range of people about their service experience, the difference a service has made, and how things could be better.

Participation

Participation is about emphasising positive Māori involvement at all levels. In an evaluation context, this means ensuring it is easy for people to participate in the process (such as holding events at convenient times and places). There are a wide range of factors that need to be considered when creating an accessible feedback process, for example: language, appropriate greetings, correct pronunciation of words, family structure, gender, disability, sexual orientation, religious orientation, and neighbourhood context.

Not accounting for these factors can result in creating barriers to participation, such as not having the support of family or community leaders, holding a meeting or discussion group at a time that clashes with an important community event or time for religious observance, or booking a venue unsuitable for infants, the elderly or people with access or communication needs.

4. Choose your questions

We strongly recommend collecting information about three things:

- **Connections:** who you reached
- **Activities:** what you did
- **Impact:** the difference you made

There are a range of ways you can collect this information. Some of it might already exist in your organisation's records, for example, you might already have information you can use to describe who you have worked with and what you have done.

Below, we offer questions you might like to use in a community impact survey to collect more information. With a bit of re-wording, they could also be used as discussion points for interviews or focus groups to gather more in-depth information about the difference your organisation has made.

Question set 1: Connections

Your organisation might have information about everyone you have connected with in its records. You can briefly summarise that information in your impact assessment report.

You may also want to ask as many community partners and service users as possible to provide feedback on what your organisation has done with or for them, the difference that has made, and what could be done differently to make more of a positive difference.

The following questions could help you assess if community partners or certain groups of service users (such as men, women or people of different ages) say different things about your organization:

1. What gender are you?

2. What is your age?

3. What ethnic group or groups do you identify with?

4. Which suburb or town do you live in?

5. *For community organisations: Which sector or sectors do you work in?*

Knowing who has provided feedback to your community impact survey will help identify if the respondents' opinions, perceived impacts and experiences are the same or different across population groups.

Question set 2: Activities

Your organisation may have a full record of what it has done/ its activities in its records. Briefly summarise that information in your impact assessment report. It is recommended that you ask as many of your community partners and service users as possible (and reasonable) to provide feedback on those things.

These questions are designed to help you understand:

- What your community thinks your organisation does well; and

- What your community thinks you should or could do to have more of an impact.

1. Is there something you think [your organisation's name] is doing really well? If so, what is it?

2. Is there something we could do more of, differently or improve on at [your organisation's name]? Please tell us what that is.

3. What can [your organisation's name] do to work better with local services, organisations and businesses to contribute to positive community change.

Question set 3: Impact

These questions may help you learn more about the difference your organisation – or one of its services, product or activities – is making for the people you work with. These questions should be asked at least a few weeks or up to a few months after people have been with your organisation to allow the potential for change to take effect. You can ask these questions (or a version of them) in a survey, interviews or focus groups.

1. Has [your organisation or a service] helped make any changes (either positive or negative) in your life?

- Yes, it has made a lot of difference

- Yes, it has made some difference

- I'm not sure

- It has made no difference

Question 2 should only be asked if people say your organisation or service has made a difference.

2. Was the difference [your organisation or a service] made:

- Positive
  - ▷ *Please describe the changes*

- Negative
  - ▷ *Please describe the changes*

- Both positive and negative
  - ▷ *Please describe the changes*

5. Choose your methods

There are a large number of methods that can be used to collect information. An online or paper-based survey is a very common and useful approach. There are other methods you might find useful depending on who you are working with and the kinds of information you need to collect.

Method	Pros	Cons
Online survey	There are free online survey platforms that are easy to use Respondents can give feedback from where and when it suits them If the survey is anonymous they're great for making people feel okay about giving feedback Ideal for getting feedback from a large sample of customers or service users	Not easy for people with low literacy Not easy for people without internet access or comfortable online
Paper-based survey	Great for people without internet access or who aren't comfortable online	Much more labour intensive than online surveys Respondents tend to give less written feedback than they do online People's handwriting can be hard to read
Registration form	Collects all your service user, customer or attendees' details Can include a request for permission to contact people for feedback	You need to store the information safely and securely

Method	Pros	Cons
Follow-up phone calls	Works well for people with low-literacy Service users can ask questions Interviewers can ask for clarification	Time-consuming
Focus group	Can hear what service users think about each other's ideas People can ask each other questions Great for getting further insight into questions or topics of particular interest	People can feel embarrassed to speak up or honestly in a 'public' setting Facilitators need to be skilled to ensure strong personalities don't dominate a focus group or take the discussion off-topic If your organisation has a lot of service users or customers, focus group feedback can't be taken as indicative of all service users views
Interview	Face to face or 'kanohi ki te kanohi' works particularly well for some people Interviewers can ask for clarification	People can feel embarrassed to speak honestly in front of an interviewer If your organisation has a lot of service users or customers, a series of interviews can't be taken as indicative of all service users views
Storytelling	Excellent for allowing funders or grant makers to hear directly from people involved in a grantee's activity.	One or a few storytellers can't convey all perspectives that service users or communities may have. Best used in conjunction with another way for people to provide feedback.

6. Analyse

There are at least five questions to keep in mind when you analyse the feedback:

1. Who have we heard from?

2. What did they say about what we do?

3. What did they say about difference we made?

4. A-ha! moments. Are there interesting or useful insights about our service?

5. Given what we've heard, should we think about doing anything differently next year?

Connections

Use graphs and basic statistics (such as percentages) to describe the characteristics of the people you have worked with and who has given you feedback (for example: age and ethnicity). Online survey platforms (such as www.surveymonkey.com) can automatically create graphs that you can download and include in reports if you collect data using their survey tool.

- How many women, men and people of different ages and ethnicities (and so on) have registered with your organisation, attended workshops, or used your services.

- Show the characteristics of the people who have given you feedback (e.g. survey respondents)

- Describe how closely your registration or membership and survey respondents match the people you wanted to reach? Are you reaching and hearing from the people you want to? Who aren't you reaching or hearing from that you'd like to?

Activities

Use graphs and basic statistics (such as percentages) to describe:

- How many people have recommended your service to others (i.e. the fixed choice answers to question set 2). Are there differences between demographic groups?

Question set 2 includes options for people to give open-ended feedback about what people have told others about your organisation. Read through that feedback to find what people most commonly talked about (i.e. feedback themes). Ask a colleague to do so to and compare your notes. Discuss where you picked up on different things and what the final set of themes is. Write up a definition of each of those themes and find quotes that illustrate the themes.

- What did people say about your service to others?
- What did they say your service does well?
- What did they say your organisation could do to improve?

Impact

Question set 3: If people said there were positive changes in their lives.

- How many people say your organisation has made a difference? What percentage of all respondents said this?

- Do some groups say you have made a difference and others say you haven't? Use graphs and percentages to describe this data.

Analyse people's comments to see what they said the impacts were. What did they most often say the impacts were? Did everyone say the same thing or are there a few different impacts to note?

JRM Trust are interested in hearing about any changes to people's lives. They are also particularly interested in changes in these areas. Did your respondents talk about any of those things? If so, what do they say?

- Connectedness to others
- Employment
- Skills and education
- Wellbeing and quality of life
- Cultural identity and pride

A-ha! moments

What was surprising, most interesting or least expected in your feedback? Describe the surprising, most interesting or least expected insights and explain how they relate to the statistics or feedback themes.

7. Report

J R McKenzie Trust is very interested in hearing from ngā kaikōkiri about what they have done and the difference that has made to their communities. We want to learn about what our funding partnerships have contributed to, and to hear about what we as a funding partner can do better or differently to have more of an impact.

The Trust would be grateful to receive a brief report – i.e. one or two pages – on what your organisation has heard and what it thinks about the information it collected. An example report is provided below. You may also include the information in your J R McKenzie Trust end of grant form or in your Face to Face reporting with the J R McKenzie Trust.

Connections	Our registration records show that in 2019 we reached 876 women and 298 men (in person). 202 of these people were under 25 years of age, 385 were between 25 and 49, and 487 were 50 or older. 12% were Māori and 10% were Pacific. Our online resources were accessed 44,786 times.
Activities	Our service records show we held 104 self-management workshops and provided 412 intensive support sessions. We also actively participated in 20 community network meetings and 17 mental wellbeing networks to hear about community trends and raise awareness about anxiety and support services.
Impacts	68% of the survey respondents said the self-management workshops helped them manage their anxiety "very well" and 29% said they helped "a little". Many more women than men said the workshops were helpful. Our intensive support services were very well received – more than 80% of all users said it was "very helpful." The changes people described were feeling more comfortable in social settings, feeling less anxious in the work place, and improved family relationships. Some respondents also said they were drinking less alcohol and had improved emotional regulation. The survey respondents said what helped them most was learning about self-management techniques, understanding triggers, and hearing from other sufferers about what worked for them.
Learning	The feedback shows that our workshops seem to be helping women more than men. It also seems like we are not as appealing or accessible to young people and Māori and Pacific people as we would like to be, given the rates of anxiety among these population groups (according to MoH data). We have too little information about who is accessing our online resources, what for and how useful they are.
Actions	Given all this, next year: We would like to connect with more young people and more Māori and Pacific people We will be seeking advice from youth health and Māori and Pacific health sector consultants about what more we could do to support these populations groups. We will look into how we can better track and assess our online resources.

Appendix 1: Impact Assessment Plan worksheet

1. Change statement (see section 1 for help with this)

We want to work with _____

by _____

so that _____

Therefore, we expect to
contribute to _____

2. Who you need to collect information from See sections 2 and 4 for help with this.

3. What you need to collect information about Remember to think about 'connections', 'activity' and 'impact'. See sections 2 and 4 for help with this.

4. How you will do this This should describe how you will reach people and collect the information you need. See sections 3 and 5 for help with this.

5. Analysis and reporting This should describe how you will analyse the information and report it. See sections 6 and 7 for help with this.

Appendix 2: Impact story

Connections: who we connected with

Activities: what we did

Impacts: the difference we made

What we've learnt

Actions: given what we've learnt we intend to:

Appendix 3: Tips and tricks

1. Participant information and consent

Before you collect people's details and/or feedback it's important to tell them what will happen to their details and information. Tell them:

Who: who will get to see it.

What: what you will do with it.

Where: where it will be stored and used.

Why: why you are collecting it.

When: how long you will hold it for.

How: their information will be stored and protected.

People have the right to say "no", that they do not want to give their details or feedback. They also need to be assured that if they say no they can still work with you or use your services. Parents or caregivers need to say it's okay (or not) to take a child's details or feedback.

It's essential to thank people for taking the time to provide feedback that will help you.

2. How to store information safely

Electronic records of focus group, interview and survey data needs to be password protected on a device stored in a locked facility. Only individuals employed by or contracted to the organisation that collected the information should have access to the data stored on the device.

3. How to know if you need ethics approval, and how to get it

Typical evaluation and impact assessment does not require an ethics review. However, if you are considering a study that has the potential to disadvantage or cause harm (such as not providing a service to some people that you are providing to others to see what difference it makes), you can submit an application for ethical review to the New Zealand Ethics Committee. Information about the New Zealand Ethics Committee and its application form can be found here. Information about the ethical framework that the New Zealand Ethics Committee refers to can be found here.

4. Online survey provider

Survey Monkey is an easy to use, free online survey platform. It also has more advanced features that you need to pay for.

www.surveymonkey.com

5. Interviews

Interviews are great for understanding people's points of view or experiences in-depth. However, they are time consuming and mean your time and effort goes into hearing from a small number of people.

Do

- Introduce yourself, explain the purpose of the interview and how their feedback will be used (see participant information and consent, above).
- Have an interview plan that has some structure and simple, easy, short questions.
- Be gentle: let people finish; give them time to think; tolerate pauses.
- Be flexible: respond to what is important to interviewee. Allow them time to 'wander' off-topic.
- Be prepared to question what is said, to clarify potential inconsistencies or gaps in the interviewee's narrative.

Don't

- Talk too much yourself.
- Challenge what is being said; remain impartial.
- Share your own opinions (verbally or non-verbally).

6. Focus groups

A focus group is great for getting a sense of a range of people's points of view on a topic or experience of something. They usually involve six to ten people. Focus groups can result in 'group think' where some participants are influenced by the opinions of one or two dominant members and feel pressured to conform.

Do

- Ask someone familiar with your organisation but independent to facilitate the discussion
- Welcome people, give time for people to get to know each other. Open with a fun activity.
- Provide refreshments.
- Record the discussion (with people's consent).
- Prepare open-ended questions for the group to discuss, based on gathering information about your organisation's contribution and the difference it's made.
- Look for quieter members - invite everyone to share their views.
- Tell everyone there are no right answers – everyone is free to respectfully share their views.
- Prompt discussion on key insights – say "I would like to hear more about …" or "Who else has something else to say about …"

Don't

- Allow one or two people to dominate or to use the focus group for their own agenda.
- Permit side discussion; this can distract others from the main discussion.
- Take sides or challenge what is being said; remain impartial.
- Share your own opinions (verbally or non-verbally).
- Use jargon.

7. Where to get more help

- What Works: A local website dedicated to helping the community sector know and show the difference made: **whatworks.org.nz**
- Another great evaluation website: **betterevaluation.org**
- Aotearoa/ New Zealand Evaluation Association: **anzea.org.nz**

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