

PHASE II: ASSESS

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Phase I DESIGN

available at
impkt.tools



Phase II ASSESS

closed beta



Phase III NARRATE

(coming soon)



Phase IV EVALUATE

(coming soon)





Overview

We've put the workshops behind us, and now it's time to get familiar with spreadsheets, data collection techniques and finally the data you'll collect! Working from the design brief you put together in Phase I, you'll work with the specialists in your team through six more steps towards an impact assessment.

Steps		What you do	Result	
II.1		Preparation	Get back into the flow, refine your team and plan of attack	You feel confident to navigate the next steps
II.2		Develop your indicators	Agree how you'll measure that change has occurred	You have an updated Change Pathway with indicators
II.3		Plan the data collection	Agree how to collect data & gather the tools you need	You have an updated Change Pathway with methods
II.4		Data Collection ... Go!	Set your data collection plan in action!	You have collected and backed up your data
II.5		Analyse the data	Get to know your data	You feel confident in the data you have collected
II.6		Draw conclusions	Connect the data with you design brief	See how far you have gone to showing your impact

II.1 Preparation

Good preparation is essential. So make some time to walk through how you will move from the design brief you developed in Phase I, and use it to collect meaningful data to support it.

Who You

Why To get familiar with managing the process

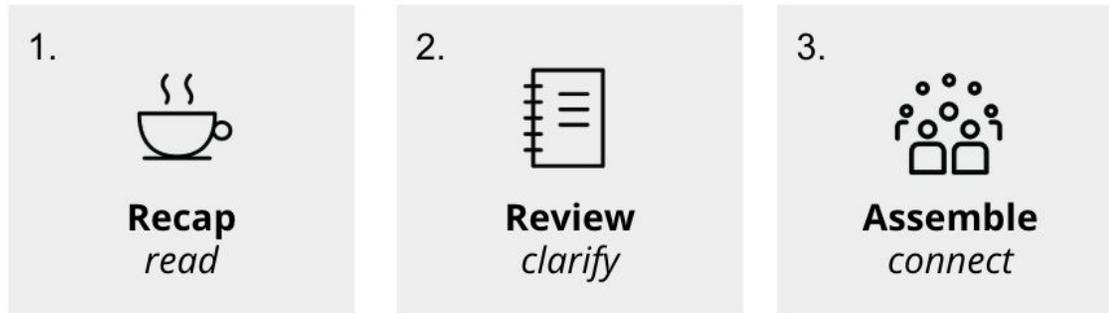
Time needed About 3/4 hours

- Your results**
- A refreshed team
 - Overview of everything you need

*** Before you start**
You'll notice there are no workshops in Phase II - instead we encourage you to look into the roles you already have in your organisations, and draw on the expertise you have around you to guide you through the steps in this phase.

Walkthrough

Before you start you need to check you have the team you need, and the resources available to complete these next few steps. Time to flex your project management skills, and keep everyone inspired, motivated and on board to complete your impact assessment!



First things first - recap

Congratulations on making it to Phase II! You've come a long way since you first started out on your impact journey. When you started out you might have had an idea of how this would progress - are you still working towards that vision? Take a look back over your work in Phase I, and remind yourself what you wanted to achieve.

Taking the time to check you are really focusing your work around what changes

is an important part of building impact into the mindset of your team, and your organisation. We call this impact thinking.

Tip: *If you feel your brief has strayed too far from your vision, or isn't focused enough on what changes, think about re-running the elements of the design workshops that encouraged the type of thinking and output you feel is missing, or needs refining.*

Take a look at your resources

Take a look through the rest of this Phase and think about how this process will work in your project or organisation. You already have buy-in from management to undertake an impact assessment - do you still have access to the resources you need to deliver it?

The availability of resources - people, tools, time - can significantly affect the type of conclusions you are able to draw from the data you collect in this Phase.

Generally speaking, the more resources you have available, the greater rigour and complexity can be applied in the process of data collection and analysis.

Good questions to ask:

- What resources are you able to dedicate to this process?
- How much time do you and your team have available?
- What are the financial resources you can invest in this process?
- What is the timeframe or deadline that you are working with?

Tip: *Keep it simple! If this is your first time, or you are against a tight deadline, start small and keep data collection lean. It may require some trial and error to collect the right amount of data, but you will get there!*

Reassemble your team

Your team in Phase I may not be the people you need to identify the metrics and questions for the data collection and analysis aspects of this phase.

If you work for a large organisation, you may have the support of specialised teams who can help you to manage the data collection and analysis phase. In a smaller organisation, the entire impact assessment may be done by the same 2-4 people.

Tip: *Hand-overs between teams are often weak points in a process, resulting in, for example, lost data or misunderstandings of responsibility. One way to reduce this risk is*

to have at least one (but ideally more) people involved in all phases of the impact assessment.

You will be familiar with what your organisation can offer to support this process. If you're not, now is the time to find out.

When you reach you to your new team - perhaps you have a kick-off meeting to walk them through this next set of steps - check with them what resources they think they need. The more specialists you have in your team, the better you should be able to anticipate the resources you need to secure access to.



Case Study: Involving external knowledge in your team

The Statens Museum for Kunst (SMK), Denmark's national gallery, assumed that digitalization of the museums collection would benefit specific user groups. With this in mind SMK started an initiative to open up its digital collection: *SMK Open*.

As part of SMK Open a workshop was hosted during Copenhagen's *Young People's Meeting*, a public event for 15-25 year olds to foster democratic engagement. The goal of the workshop was to use open art as a tool to work with difficult emotions and increase empathy towards others. SMK was interested in the impact of the workshop on its participants and decided to develop an impact assessment was conducted.

Early on in the development of the impact assessment the team of SMK Open chose to involve external experts. This was quickly decided after the team critically reflected on their own role and ability to objectively assess their own work. *"People who are close to the project plan and its ambitions are not necessarily the ones who are best equipped to figure out how to assess its impact,"* according to Merete Sanderhoff, curator and Senior Advisor of SMK's Digital Museum Practice.

Although Sanderhoff herself was very involved in the event, she did not want to both create and evaluate the workshop herself: *"You need to attempt to stay neutral during data collection and data analysis. I knew that I was too close to the project."*

Sanderhoff and her team decided to take a step back and involve other people with more distance to the workshop in the development of the assessment. They consciously involved people with different backgrounds. One expert was an experienced anthropologist, the other a senior researcher of User Experience within SMK who had not been part of the project. Together they developed most of the impact assessment.

Tip: *When starting a new project, try to include impact assessment as part of your budget. This can allow you to hire external experts to support you during the data collection and assessment process.*

With guidance of the external experts, Sanderhoff and her team focused their support on the data collection process. The experts set up the research and developed the questionnaire.

The SMK Open team contributed by conducting a number of interviews with stakeholders as part of the data collection strategy. Since it was important to compare the qualitative insights from the interviews, each interview had to be conducted in the same structured manner. Every interviewer therefore followed the same structure and guidelines that had been designed by the external experts. Working together in close collaboration the SMK Open team and external researchers

increased the volume of data they collected, without compromising on its quality.

Follow [SMK's impact journey](#), and read the impact assessment undertaken on this event - **Statens Museum fur Kunst: The social impact of using art to increase civic participation of young people, 2018**

II.2 Develop your indicators

You've co-created your design brief, now it's time to sit down together with your team and take a strategic look at what you aim to achieve.

Who You and your team

Why Develop the indicators that will illustrate if change has occurred

Time needed 5-6 hours

Your results

- Indicators for each outcome
- A refined & prioritised change pathway

Walkthrough

It's time to work together with your team to refine the Design Brief and Change Pathway developed in Phase I so you can move confidently into data collection. You'll need to lead the discussions; striking a balance between being flexible and keeping moving the process forward.



You finished Phase 1 by brainstorming with your workshop participants the indicators and methods that could help you complete your impact assessment - documented in the Change Pathway.

To capture the extra information you create in this step, we've created an **extension** to the Change Pathway ([see: p11 - Documenting your Data Collection Plan](#)).

Look at the big picture

With you reassembled team make a start and review the work you documented in Phase I. Take a look at your initial motivation to get started with measuring impact.

You know your team, and you know what level of discussion works well for you, and how you frame your questions to stimulate open and honest reflection.

As a guide, you should be asking yourself;

- What do you want to assess?
- Why do you want to assess it?
- What will you do with the results?
- How important is it that know this information?

An alternative way to frame these:

- What are you trying to achieve and learn and for what purpose?

- Are you measuring impact to demonstrate efficacy or to report to an external funder, or are you interested in using data to improve your work?

Recap

With these reflections in mind, take a deeper dive into your Change Pathway. Does your it still make sense to the team? What is missing from it, and what can you add to it?

Tip: *Reframing and reforming the change pathway can be a natural outcome at this point. With the benefit of hindsight and the experience of having gone through this a few times, you'll find your own perceptions start to shift as well. Now is the time you need to balance being flexible with maintaining a clear focus on your end goal.*

Review the stakeholders, outputs, outcomes and impact you defined in Phase I. This is especially important if a lot of time has passed between steps or phases. Document the changes you make in the Change Pathway.

Tip: *Keep your focus on 'change' - outcomes not outputs. Some things may be easy to measure (outputs) but tell us little about the*

change for our stakeholders. Begin by reminding your team what to focus on: measuring outcomes for impact.

Now that you have refined your Change Pathway, we need to embellish it with information about the measurements you want to use to show that a change has happened, and prioritise these to enable the development of a data collection plan.

Decide what you will measure

It's tempting, but you're not quite ready to skip forward to writing questions and testing surveys. Before you get there you need to decide what you will measure - which indicators will you use to help you demonstrate that a change has occurred?

Let's start by clarifying what we mean when we talk about indicators. We consider an indicator as information that allows us to measure change, that will show us whether the change has happened or not. When you look at your Change Pathway, each outcome you have identified might have one or more indicators associated to it.

A good question to ask yourself when thinking about the value of setting indicators is: what kind of 'proof' do you

want to have before you can claim something has changed as a consequence of you activities?

There are two types of indicators.

Objective indicators represent facts - for example, income or visits to a museum.

Some examples include:

- Number of researchers who would recommend Europeana Pro to a colleague or friend (short - long term, quantitative)
- Number of times Europeana resources are referenced in published research since 2010 (long term, quantitative)

Subjective indicators represent opinions or perceptions - for example, enjoyment or quality of life. Such as;

- Number of researchers in the Europeana Research Community who report that access to Europeana enables them to complete high quality research (short and/or long term, qualitative)

You can use the **extension** to the Change Pathway to maintain the connection between these elements (**see: p11. Documenting your Data Collection Plan**) and document the indicators you agree for each outcome.

Choosing a good indicator

Indicators can be simple, and can easily be confused with outputs. Ideally, you will achieve a balance of subjective and objective indicators (e.g. someone visits a hospital less (objective) but still feels ill (subjective)).

There may not be a pre-formulated list of indicators for us to use, but this doesn't mean you have to reinvent the wheel. Standard indicators are commonly developed and used in cultural research and in other sectors, as well as in global cross-sector strategic initiatives such as the UN's Sustainable Development Goals (*see table for more examples*). It is likely that not many of them will be relevant for your work, but it's good practice to see if the data you collect can be comparable or benefit from following others practices.

Tip: *Use standard indicators when you can. It saves you time and makes it easier to draw comparisons with other research using the same indicators.*

Take a look at existing indicators

- The UN's [Sustainable Development Goals](#)
- Sinzers' [Standards Library](#)
- Global Reporting Initiative [Standards](#)
- [Thematic indicators for Culture in the 2030 agenda](#)

For example, the [Net Promoter Score](#) is a common indicator used to measure satisfaction of a service or product among its users. Since it's so commonly used, there are also general rules on what scores could be considered 'Excellent' or 'World Class'¹. It's not useful in every context - you should check that the data you'll collect will tell you what you really need to know.

Tip: *It can be tempting to focus on data that are convenient and easily available rather than on what tells the most important story. Avoid letting convenience determine what you measure.*

¹ +50 and +70 respectively

You will also want to look at literature, case studies, or similar work that other organisations similar to yours have done. This will help you to further focus on what still needs to be measured, determine the priorities for which data to collect and assess and design the appropriate research questions.

Tip: *Avoid cherry picking! Resist the temptation to pick only literature and existing evidence that supports your work.*

Whether you use standardised indicators, or create your own, good indicators are SMART;

- **Specific:** it's clear what change the indicator represents
- **Measurable:** it can be counted or observed (that it is measurable)
- **Attributable:** there is a link between your activities and the outcome
- **Realistic:** the information can be collected with the resource you have
- **Timely:** that you can collect it when you need it and at an appropriate time

Now we've taken a deeper look at what indicators are, it's over to you. Book some time with your team and co-create the indicators you want to use to measure

your outcomes. Use the add-on to the Change Pathway to document them.

Tip: *If you're not sure how to structure this conversation with your team, take a look at Phase I and think about how you adapt some of the exercises you used from that. Or ask your team to recommend an exercise to help you brainstorm indicators - however you do it, remember to be mindful of the considerations explained in this step.*

Prioritisation

Now you have identified how you will measure change, you probably have a long list of outcomes & indicators that needs refining.

It's not realistic to try to measure every outcome for every stakeholder. In Phase I, you will have prioritised the stakeholders for whom you think you have the greatest impact, or for whom you need to measure the impact of your work. Now, we have the opportunity to think of the outcomes that are most important for these stakeholders.

We have two ways of thinking of how to prioritise which together helps you to focus on which outcomes are more

important to support your vision of impact:

- **Materiality:** ask yourself, is the outcome significant enough for the stakeholder for us to measure it? Is it a big or a small change? Why is it a valuable outcome to better understand?
- **Accountability:** if you had done nothing, how much of this change would have been realised anyway? Which outcomes are you responsible for, and what do you not need to be responsible for?

Talking through prioritization is a job for the team - get them back in the same space and walk them through the elements. Your goal is to agree which outcomes are your priority to measure, and which you can live without.

Tip: *Running the process of prioritisation immediately after determining indicators keeps your team efficient and focused on making good decisions. A vital step towards building a comprehensive data collection plan.*

Final checks

You're on a roll, but don't stop looking around to learn from what others are

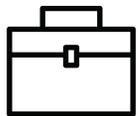
doing. Ask you team to keep a look out for literature and existing research that can support or contradict the outcomes you aim to evidence, or your overall impact vision.

Tip: *Keep the focus on **all** the impact you make. It is tempting to focus on collecting data on the positive changes while ignoring the unintended consequences (negative or positive) of your work.*

Before you move onto the next step, take a final moment with you team to check;

- Do you agree on what the most important outcomes are to measure for each stakeholder?
- Do you have an equitable balance of outcomes for each of your stakeholders?

Whatever your reason and motivation, think of how to design your own unique approach to data collection and analysis in a way that is proportional to your goal and the resources you have available.



Documenting your data collection plan

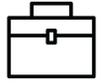
As you move through the steps in Phase II, you'll want to document changes, decisions, indicators and prioritisations that you make around the Change Pathway. To do this we added an extension to the Change Pathway that provides a template you will use to document your data collection plan.

Before you can start the data collection process, run through each indicator and check: do you already collect this data in your organisation? Is this data relevant for your research?

For the indicators you are not yet collecting information for, you now need to start preparing to define and implement a data collection plan, thinking about where and how you'll

get data, the sample that will make this valid and the research plan (the whole how/why/when/where).

outcome	indicators	source and sample	data collection method and plan
<i>the changes that have occurred in (or for) your stakeholders that can be directly attributed to your activities (see Phase I for a recap!)</i>	<i>what are the things that show us that the outcome has been achieved?</i>	<i>where can we get the data from (existing data sources or new data needs to be collected)</i>	<i>surveys, interviews, analysing existing data sources...consider pros and cons when and how can we collect this data?</i>
e.g. pupils engage more in heritage as a result of going to Transcribathon event	e.g. number of pupils who use more digital heritage in homework assignments in the four months after the Transcribathon event	e.g. we need at least 10% of educators to participate	e.g. follow-up interviews with educators after Transcribathon event. Challenge: small data sample, need a native speaker trained in qualitative methods



Qualitative vs quantitative data

Check out this table² of the main types of data. This could help you to determine what type of data you want to choose for your impact assessment.

Data	What	When	Advantages	Disadvantages
Quantitative	Numbers	To answer questions about how many, how much?	Generalisable to larger population	Difficult to interpret without context
		To make comparisons between different (groups of) people	(Relatively) easy to analyse	Not everything can be quantified
		To get a general overview of a situation	Reliable and consistent data	Building representative samples
Qualitative	Stories Movements Attributes Properties Descriptive Conceptual	To answer questions about why and how?	Rich, in-depth information	Time-consuming in collection and analysis
		To dig deeply into a problem	Flexibility in process	Interpretation strongly depends on researcher
		To understand context	Insight into links and causation	Rarely generalisable to larger population

² Table is loosely adapted from the University of Minnesota ([link](#)), Key Differences ([link](#)) and G2 ([link](#)).



II.3 Plan the Data Collection

Now it's time to think about how to collect the data you need and to make sure you're prepared to manage the process.

Who You

Why To document the who, what, when, where and how of collecting your data so that you're ready to start

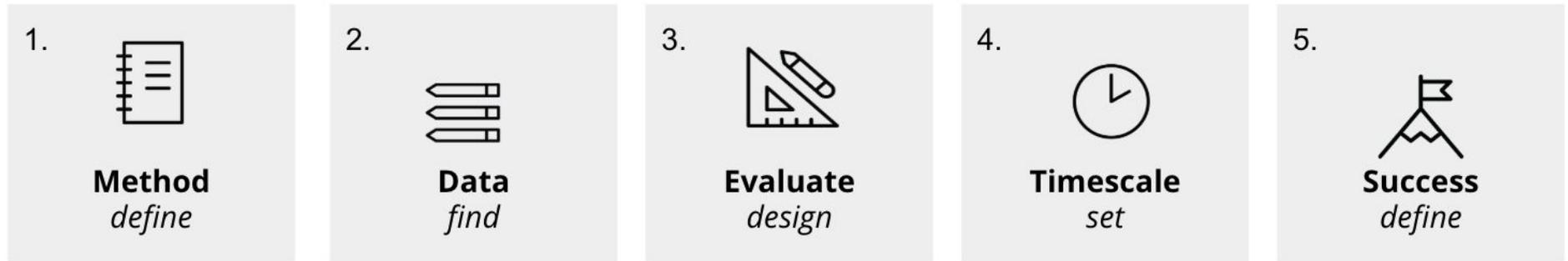
Time needed 3 - 4 hours

Your results

- An updated Phase II Change Pathway
- A timeline and a plan of action

Walkthrough

You've updated your Change Pathway with the indicators that could help show if a change has occurred for your stakeholders. Now is the time to draw on the specialists in your team to take you through the Data Collection Planning.



Define your method

A 'method' is the way or ways you collect and analyse data. For now, we'll focus on how to collect the data.

Data comes in different forms, qualitative and quantitative. There are advantages and disadvantages to the methods used to collect each type of data. **(See p14 for the pros and cons of each approach)**

Tip: *If your time and resources allow it, use multiple methods to gather more complete information. A balance of methods can allow you to investigate causality.*

Data can be collected in a number of ways - the most common methods are through surveys, interviews, focus groups and observations.

Find your 'data points'

The most fitting data collection method for your research will depend on when and where you can collect data. How can you reach out to your stakeholders so that you can collect data from them. When and where you can collect this data? Consider:

- Where your stakeholders are located
- How you can access or contact them

- Whether a group or subgroup can be representative of your stakeholder

Tip: *Sometimes your stakeholder might not be the one you are able to collect data from directly. For example, asking young children to reflect on how they experienced an activity may be difficult, instead you could interview their parents or teachers.*

To be significant, the data that you collect should reach a set threshold of representation. To help you evaluate if you have reached this, think through your ideal sample.

- What does it look like (both in terms of the range of stakeholders and their characteristics)?
- What do you need as an absolute minimum sample size for your assessment to be representative of your stakeholders?

Determine evaluation design

If you know how you will collect your data you now need to think about the design of your evaluation.

- Are you going to compare a pre (baseline) and post-situation (endline)?
- Or do you want to continually monitor the effects of your work (and thus collect data on a continuous basis)?

- Are you doing retrospective research (looking back on what happened) focused on a certain time period?
- Will you collect data at multiple points after the activity has finished?
- Or do you only collect data once?

Tip: *The data you want to collect is what you will use to tell your story of change. That change can take place over the long-term or short-term. Think about how you can best collect data to reflect this.*

When should you collect data, then? Here we're talking about a longitudinal perspective. Asking people questions about an event that took place a year ago may not give you very reliable information. At the same time, asking people questions too soon after an intervention may lead to you missing out on relevant changes because they have not occurred yet. Therefore, you could collect data from stakeholders in the short-term and long-term, if resources allow.

It is important to bear in mind that impact can take a long time to appear. However, you should be able to show that you've helped create short and medium term outcomes that can help

lead to this impact (see more in the analysis section).

Tip: *Think about how you are communicating to your stakeholders about*

your data collection. You might be able to ensure their participation by telling them why collecting this data is important for you.

Set realistic timelines

By now you should have a feeling of what is a realistic timescale to set for your data collection and analysis.

Some methods are more time-consuming than others, depending on the scope and rigour you have decided on. For example, you may want to focus in more depth on a smaller sample of stakeholders, but that will require resources over a long time period. Thinking through what is a realistic timescale for you and your team will help you set a realistic timeline.

Tip: *Take the practicalities into consideration, e.g. travelling for face-to-face interviews, sending reminders for online surveys or getting enough people together for a focus group.*

After setting the timeline, stay open to revisiting decisions. As you put in place your preparations, you might find things are not going to plan. Being flexible and

open to revisiting decisions you made at an earlier stage can help you navigate past these.

Tip: *If you run into problems, you can always look at who you have involved in the process so far. Maybe a team mate can help you open up access to a data collection tool or authorise the resources you need.*

Set your success criteria

How will you know that your data collection is going to plan? Clearly defined success criteria can help you evaluate progress during data collection, and when it's time to change it.

Tip: *Use your team to help you set and agree your success criteria. Collectively agreeing these helps keep your team involved during the data collection step.*

It can also help you think through what kind of contingency plans you can put in place if data collection doesn't go to plan.

Before you move onto the next step, take a final moment with you team to check;

- do your indicators still make sense in relation to the outcomes?
- has your perspective on our priority outcomes changed?
- when is the best time to collect the data? Are you missing any opportunities?
- will your sample size give us valid results?
- is your timeline manageable?

Success criteria vs goals

Whichever way you look at it, you'll want to set some markers that help you evaluate your progress.

Success criteria identify the specific achievements you must meet in order to be successful. To put it another way, if you don't meet your success criteria, the activity you are applying them to fails.

Goals are general achievements that you should meet.

Data collection methods

Feeling rusty? Read our refresher on the different types of data and methods for collecting it before you make your decisions.

You or someone in your team might be familiar with the data you want to collect. Or know which methods work well for your audiences. But before you decide on your data collection methods, remind yourself of the options available to you.

Primary or secondary data?

Is the data collected by your organisation for this purpose only? Then it's primary data. Secondary data describes data that has been collected by another organisation or for a different purpose.

Be inspired by other people's data

Not only is secondary data already gathered, but it's also a great source of inspiration. It can be a great starting

point for your research as the hard work has already been done by others.

Tip: *Determine how reliable a dataset is before you decide to use it in your own work.*

Looking for data about the European cultural heritage Sector?

Browse through the [ENUMERATE Observatory](#) - they've been collecting data about the state of the digital cultural heritage sector since 2013.

Common approaches to collecting primary data

There is a wide range of data collection methods you can choose from - too many for us to list. But we've made a start and shared with you a few of the most common data collection methods.

How do you choose the right method?

Check out Social Impact Navigator's [guide to data collection methods](#), with a table showing which method works best in different circumstances.

Method	What	When	Advantages	Disadvantages
Survey	A good method to ask the same questions to a large amount of people	If you want to ask a lot of people the same easy-to-answer questions to effectively compare experiences and get a good high-level overview of what change occurred for them	Low cost	Bias due to self-reporting
			Large sample	Low response rate
			Wide reach	Inflexible
			Can be anonymous	Misses context in answers
			Easy to analyse	Responses may not be completed or valid
			Can be multilingual	
Interviews	Face-to-face or phone conversation to gather deep insights, first-hand experiences or expert opinions	If you are interested in gaining more context and understanding of your stakeholders (e.g. to better interpret quantitative data)	In-depth answers	Time consuming
			Also open to people with low literacy skills	Need to train interviewers
			Opportunity to explore unknown or sensitive issues in more depth	Interviewer bias (learn about being biased as an interviewer and how to avoid this: link)
			Generally people are willing to participate	Sensitive issues can be challenging for the interviewer
			Flexibility in the questions you pose	Difficult to compare between interviewees
Focus groups	Group discussion to stimulate conversation about a (range of) topic(s)	If you are looking for a better understanding of an issue that is shared by multiple people and you assume the group dynamic will give you additional relevant information	No literacy requirements	No privacy or anonymity
			Opportunity to explore complex issues	Difficult to bring together a balanced and representative group of participants
			Different stakeholder perspectives	The strongest voices are likely to dominate the conversation
			Conversation between participants can give you more insights and nuance	Need a skilled and sensitive group leader
Observation		If you do not just want to ask people	Real-life insights	Only gives you a snap-shot of the full

	Extensive description of what is happening by observing people in their natural setting	about how they do or experience something but rather see it with your own eyes to get a better idea of their experience		situation
			Provides context and nuance	Observer judgement (Learn about observer judgement and how to avoid this: link)
				People may change their behaviour when observed



Case Study: Getting the Questionnaire Right

While NLW and Wikimedia both valued their collaboration, little evidence was collected on the impact of the collaboration. So when NLW was invited by Europeana Foundation to conduct an impact assessment on their work, Jason Evans and his team took the opportunity and designed an impact assessment.

In 2015 National Library of Wales (NLW) began working with Wikimedia UK and appointed a 'National Wikedian in Residence'. In 2017, Jason Evans, was appointed as the permanent 'National Wikimedian' at NLW with the aim to bring the collaboration forward into the future. NLW developed a range of different Wikimedia-based activities and thousands of Wikipedia articles were published since Jason took up his residency.

While NLW and Wikimedia both valued their collaboration, little evidence was collected on the impact of the collaboration. So when NLW was invited by Europeana Foundation to conduct an impact assessment on their work, Evans and his team took the opportunity and designed an impact assessment.

Wicipobl

The focus of the assessment was to understand the impact of the *Wicipobl* project. *Wicipobl*, Welsh for 'Wiki-People', covers a range of Wikimedia-based activities focused around the library collections at the National Library of Wales. The project focused around the release of 4,862 Welsh portraits to Wikimedia Commons and associated metadata to Wikidata, with an emphasis on improving access to Welsh language content and providing opportunities for the public to engage through the medium of Welsh.

Design of the assessment

For Evans the objective of the assessment was not only to prove the impact of working with Wikimedia, but also to encourage other stakeholders to partner with Wikimedia.

The team used the Playbook Phase I to plan and design change pathways with measurable outcomes. Initially NLW followed the Impact Playbook to the letter, but they slowly adapted the process. As Evans notes; *“as we became more familiar with the Playbook we felt a little bit more confident and adjusted the process to suit our own needs better.”*

Validation is important

In order to collect new insights and evidence the team decided to collect data from a number of key stakeholders; students and teachers. Evans and his team developed a questionnaire. The team learned a lot from the data collection process.

As soon as Evans and his team put out their questionnaire they started to receive suggestions for adding additional questions to complement their research: *“That was quite frustrating because you only have one opportunity to put the right questions out there and ask respondents for their input.”*

Initially the team also did not test their questionnaire on stakeholders or potential respondents. In hindsight they realised that this a key step that they probably will include in the process next time, as testing *“(…) does not only validate the questions you want to ask, but might lead to suggestions for other questions as well.”*

Improving the engagement of responses

The team faced some challenges with regard to the engagement of respondents during data collection. The quality of responses

the NLW received was not always very high. Evans: *“Students for example were really good at filling out the questionnaires, while teachers filled it out really quickly and did not really think their answers through. For example, they skipped open questions and only ticked the boxes.”* This had an effect on the quality of the data set. For the next impact assessment Evans and his team will therefore focus on improving the engagement of stakeholders in filling out the questionnaire.

TIP: SurveyGizmo has shared some tips to get better answers ([link](#))

Future full of impact

Although the [Wicipobl impact assessment](#) is now published, the impact work of the NLW is not finished yet. Evans explains: *“We want to use the Playbook for future projects, make it part of the way we work.”* However, this does not mean every project that the NLW conducts, will undergo a complete impact assessment. *“We might use a cutdown version of the workshops and goals, and write a smaller report. If we ask the same kind of questions and the structure is similar, we can see the patterns and the impact over multiple projects.”*

Interested in reading the full impact report of NLW?
[Check out the Wicipobl Project Impact Report \(link\)](#)

Writing a good questionnaire

We've all filled in questionnaires, but what are the tips and tricks that can make your questionnaire stand out and encourage people to fill it in?

Start with who you are

Make a connection with the reader and introduce yourself!

Take a look through our list of ideas of things to include:

- Who are you and your organisation?
- Why are you conducting this survey?
- What will you do with the results?
- How long will it take to fill in?
- What is the deadline for completing it?

Tip! *Make sure you respect your readers' data and describe what you are going to do with the data, ensuring you obtain their consent where necessary. Take a look at the UK's Economic and Social Research Council (ESRC) [ethics guidance](#) and ensure that you follow the right data collection practices applicable in your country.*

Use a fresh pair of eyes

Ask your colleagues to take a look at your survey. Is it collecting the data you really want to know?

Review checklist!

- ❑ Are the questions clearly and consistently phrased?
- ❑ Are your questions leading the stakeholder to give you the answer you desire? (avoid this at all costs!)
- ❑ Have you used similar scales or styles throughout your survey?
- ❑ Are all the questions relevant for every respondent?
- ❑ Have you made sure the reader understands what they have to do for each question?
- ❑ Should you make any questions obligatory?

- ❑ Are your questions short and clear? (don't ask two questions in one!)
- ❑ Is your language clear for all stakeholders? Have you avoided colloquial phrasing or terminology?
- ❑ Does your question order make sense? (You might want to start with simple questions and end with more challenging ones, or you might want to cluster similar questions together)
- ❑ Will you use all of the data you'll collect? Applying this test will help you eradicate unnecessary questions.
- ❑ Is your survey short and accessible? (if it must be long, explain why it's necessary)
- ❑ Will multilingual options encourage better response rates?

- ❑ Can someone unfamiliar with your work test your survey? (the less familiar they are, the better insight you can get into how the survey works)

The more you think this through, the better your survey will be. If your data collection is time-sensitive, this might be the only opportunity to collect these answers, so make sure that every question counts!

Ask for help

Asking the right questions is never easy. If you are finding writing your questionnaire is more difficult than you anticipated, don't worry, you are not alone.

There are a wide range of online resources you can consult that can help you with advice on how to phrase questions, as well as how to structure - or not - the type of data you want to collect.

Consult a question bank



Check out the [bank of questions](#) provided by SurveyMonkey for ideas and examples you can use, refine and be inspired by.

How to ask a question about wellbeing?



Warwick University developed a [wellbeing scale](#) that can help you explore how to ask those tricky questions about how someone feels about their wellbeing.

Read writing guides



- Survey Monkey's [Writing Guide](#) can walk you through the process for developing a great questionnaire.

- [NCVO Knowhow](#) provides tips on how you can refine your approach to writing.

To use, or not to use, validated scales

A validated scale has been tried and tweaked by academic researchers, using representative samples.

Using validated scales in data collection is an advanced way to refine your approach. Having undergone academic rigour, they can be used as a reliable approach to collecting data in a structured way.

Consider using a validated scale if you want to be sure that your questions will give the information you are looking for to the same standard used in academic research.

Interview etiquette

Interviews might seem simple to execute, but to get the most out of them you need to do some work to get them right.

Start with who you are

Make a connection with the stakeholder and introduce yourself. Tell them:

- What you'll do with the data
- What it's for (e.g. will it inform a report, will this report be published)
- Whether or not what they say will be anonymous (and if not, how they will approve your use of the data)
- How long the interview will take
- Whether or not the interview will be recorded - you must always ask for their consent
- That they have the right to stop the interview at any time

Tip: *Take a look at the UK's Economic and Social Research Council (ESRC) [ethics guidance](#) and ensure that you follow the*

right data collection practices applicable in your country.

Structured, semi-structured or unstructured?

There are different benefits from your interview approach. A structured interview relies on predefined questions, and you will ask these questions in a fairly strict manner. In a semi-structured interview, you may have predefined questions, but the approach will be more conversational.

You may rely instead on the Change Pathway, and ask questions relating directly to this. In an unstructured interview, you can be more spontaneous in your questioning. However, for the purposes of your impact assessment, we think this might not be the most useful

approach, as this is something most commonly used in preliminary research (where you are not investigating specific change).

We recommend that you keep your interviews informal and enjoyable. You and the interviewee will enjoy the process much more and, in our experience, you'll learn much more too if the interviewee feels that it's an open and respectful setting.

Avoid leading questions

It might sound obvious, but don't lead your interviewee into positions where you encourage them to agree with you. If they don't answer a question, think about how you might ask it in a different way, but don't push the subject.

Don't forget to look out for unexpected outcomes

You might find something unexpected. This is a great opportunity to learn more about the impact of your work for your

stakeholder! Ask your interviewee to explain their point of view.

Tip: *Some easy questions that have brought out some interesting data for us include:*

- *What was the biggest success/challenge for you?*
- *Is there anything else you want to share that I haven't asked you about?*



II.4 Data Collection ... Go!

With your data collection plan in hand, all that remains now is to collect the data you need (with some review points along the way!).

Who You

Why You'll need to collect the data as you've outlined in your plan

Time needed Depends on your data collection plan

Your results

- The data
- Back-ups of the data
- Colleague buy-in to the preliminary results

Walkthrough

You're well on your way to collecting the data you need. You'll want to keep a check on progress, be patient and be diligent to ensure you get the data you are looking for, whilst leaving room for tweaks to your approach.



You've set your data collection in motion and now you need to wait. While you're waiting, you should check in with the data collection from time to time. Browse through it to ensure that it is what you are looking for.

Monitor progress

Check in on the progress of the data you are collecting from time to time.

- How are you performing against your success criteria?
- Is the data of the quality you are looking for?

- Do you need to refine your approach?

Tip: *Keep your team keen. Sharing a selection of results periodically before you have all the data collected can help keep your team motivated. You could share*

some interesting anonymised quotes or preliminary results (some data collection software does some analysis automatically and you can download this as a PDF).

Stay flexible

Sometimes plans need to be adapted. Maybe things aren't going to plan, or something has changed since your plans were made, or you learned something you wish you'd known earlier in the process.

Tip: *It can be tempting to jump at every new data collection opportunity that might emerge, but always keep in mind the resource you need to collect and analyse the data. Remember that quality is more important than quantity.*

Keeping an open mind towards adapting your approach will help you manage these challenges.

Remain cautious

Being adaptable can be a good approach, especially if things are not going to plan. But you also need to be cautious so that you don't make changes which have a significant effect on your research.

Tip: *It can be tempting to make changes to how you collect your data, and even which data you collect. If you do make changes, take the time to work through how these changes will affect your data collection, and what conclusions you can draw from them.*

Make a backup

Always keep the original master data in a safe backed-up place. Export data out of proprietary tools into a neutral format supported by multiple tools (like an Excel spreadsheet).

Things to consider:

- Do not alter the contents of the master files of collected data.
- When you clean, reformat or otherwise modify the data, always do so from a copy of the master data.

Review point

- Do you have the data you need, for example, in terms of the quality of data or the sample?
- When will you stop collecting data?

- Do you need to send any reminders or survey any other stakeholders?
- Have any new data collection points emerged? Should you pursue them?
- Have you planned for the time you'll need to transcribe any interviews?



II.5 Data analysis

So you have the data in front of you. It's time to crunch the numbers and look through any qualitative data you've collected, noting any trends and interesting responses.

Who You

Why Collecting the data isn't enough; now you need to analyse it and look for any signs that change has occurred for your stakeholders

Time needed Plenty - it depends on how much data you have

Your results

- Information that illustrates if change has occurred for your stakeholders
- An understanding of the benefits and limitations of your approach

Walkthrough

Nearly there! It's time to take a deeper look at your data.



Now you've collected the data you need, it's time to dive into it and see how it contributes to your impact assessment. In this step you'll be looking through the data to see what's relevant, what's not and using some tips to help you analyse it.

Recap

To keep your analysis phase lean and help you prepare your data, revisit the outcomes of Phases I and II so far.

Tip: *Reminding yourself of key actions taken so far will help you prepare your data for analysis with your team.*

Before you prepare your data, take some time to refresh your memory:

- What was the research question?
- Why did you decide to undertake an impact assessment?
- What are the outcomes and impact you are looking for evidence of?
- Which methods of analysis did you plan to undertake in this phase?

- Did you make any decisions during the data collection step which you need to consider in the analysis?
- Did you meet your success criteria?

Tip: *Have to hand a printed copy of your change pathway and in particular, the outcomes and indicators.*

Prepare your data

Now it's time to review and prepare your data so that it's ready for you and your team to analyse.

Expect to spend some time looking in depth at what you have collected to

ensure that it meets your own quality standards.

- Is it incomplete or spam?
- Does your data meet your success criteria?
- Is it in a good format to enable collective review with your team?

Consider whether you will delete incomplete responses or whether some data is more important than all the data you need from each respondent. **You should make notes of the decisions you have taken about your approach, because you'll need this when you are writing about your process.**

Prepare your team

You've kept your team informed during each of the steps, and now it's time to bring them back to the table and get their input on the data that has been collected.

The next blocks can be performed by a single data analyst, a pair of specialists working together or an entire team. It is helpful if everyone involved in the data collection is also involved in the data review. Remember, you are the expert in your work but that doesn't mean you are the expert in data analysis. This stage

always benefits from the input of others, to help validate your results.

Tip: *At least one person on your team should know the dataset inside and out and be able to guide others through it.*

Data analysis

You've finally arrived at the point where you can analyse your data! We recommend you block out a long chunk of time so that you can pay maximum attention to this stage.

Now that you have prepared the data, it is time to see how rich it is by making sense of it and looking for patterns.

Evaluating quantitative data requires a different approach to evaluating qualitative data as both lead to different types of information. Your approach will also depend on the skills and resources available within your organisation. When it comes to analysing quantitative data, sometimes calculating percentages or averages will suffice, and complex statistical analyses are not necessary (or possible within the skillset of your team).

Working with qualitative data

A lot of the data you've collected might be qualitative. This can be initially very overwhelming; a short interview can still create pages of data.

We use have found the following steps useful:

1. Read the data you have collected.
2. Mark ('code') any interesting points that emerge (e.g. interesting points of view or quotes) on your first read. You can 'code' the data by creating a set of references you are looking for in the data, e.g. learning objectives (learned something new), that are drawn from your outcomes and indicators.
3. Re-read the data again, and mark any new information that didn't seem so important. The more you read the data, the more you might find, especially if you have collected multiple viewpoints that you can compare.

Your analysis centres on identifying and describing patterns.

- Do you see any patterns? Are they expected or unexpected?

- Do you see any changes in patterns over time e.g. by comparing new data to the baseline set?
- Can you explain what each pattern means or why they are important?

You can also look at patterns of how participants responded to certain questions. For example, did they hesitate in an interview when they were talking about whether or not they enjoyed something? Did questionnaire respondents avoid one particular question?

Before focusing on conclusions, you want to be as certain as possible that you have

drawn all relevant information out of your data.

Tip: *If you're new to impact assessment, remember that to demonstrate impact - that all-important change in your stakeholders - you're looking for data that helps you explain or evidence this change. Your Change Pathway sets out how outcomes lead to impact. Can you evidence the outcomes that you wanted to investigate? Your data may not show if you have made a change for or in your stakeholder in a particular area.*

Use a fresh pair of eyes

What will someone else see in your data? Did they spot something you did not? Are they validating your patterns?

It's always good to get a peer review of your analysis and the patterns you have identified.

Tip: *Be ready from the beginning to document any recommendations on how to improve your work that might emerge from the data analysis stage. This is a great tangible output for your colleagues and it will help convince them of the benefit of investing in this type of research.*



II.6 Drawing conclusions

It's been a long journey to this final step - you've done a great job to get this far! You're ready to draw conclusions and see how far your data supports the impact designs you developed in Phase I. So let's go!

The final step in this phase is all about drawing conclusions. What does the data tell you about the impact of your activities? What can you learn from this information? And what have you learned from this phase?

Prepare your team

This is a team effort so first things first, let's bring your team back together.

Tip: *Drawing from different perspectives at every stage is valuable - be prepared to revisit who is part of the team in order to complete this final step.*

Drawing conclusions

It's time to translate the patterns you found during the data analysis into

useful conclusions for your impact assessment.

Before you start, it's always useful to recap and remind yourselves of the main elements of the impact designs you drew up in Phase I.

Lead your team through the data analysis and together consider:

- What do you think of these patterns (or their absence)?
- What has changed and what has not?
- What did you expect to see but not find in these patterns?
- Did any patterns surprise you?

Analysing your dataset in this way will lead you naturally to a few conclusions.

Which of those conclusions are most important to you? Can you prioritise or weight them? If you look at the patterns you found, where do you draw your accountability line?

Tip: *The conclusions you draw don't need to be limited to the impact design. It's common to use this process to reflect upon the methods you used, as well as the activities or services that are the focus of your impact assessment.*

What's next?

Once you know your most important conclusions, it is time to ask yourself: what's next?

The first thing you might want to do is share your conclusions with a wider audience -the people or organisations who are the principal audience for this impact assessment. Help them understand the research you have undertaken and how this demonstrates the impact you have had.

We'll take a look at what things you need to consider, and explore some ways to do this effectively in Phase III: Narration.

But what if you want to translate this work into action? Perhaps you've learned a thing or too along the way about how to tweak a product or service so that its users have a better experience.

Or perhaps you have noticed that your team worked really well together on this, or that there was a step you want to improve on next time?

We'll be exploring how you can use the impact assessment process to evaluate the impact of your products and services, and how to learn as an organisation in Phase IV: Evaluation.

Thank you for reading this far! We hope you've enjoyed reading more about data assessment and feel ready to take it on!

If you can't wait for the next two phases, take a look through the [impact toolkit](#) for case studies from cultural heritage organisations exploring their impact, as well as the [Europeana Impact community forum](#) talking about how they have used the Playbook and toolkit in their organisation and networks.

We're always interested to hear from fellow impact practitioners - so if you want to share your experiences, see your work featured in the toolkit, or have a question about the Playbook [get in touch!](#)

With very best wishes for a successful impact journey,

The Playbook team