



Projects delivering impact: how to define your impact monitoring and reporting strategy

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Impacts everywhere...

Expected impacts in **work programme**

Performance indicators in **proposal** submission

'Impact' criterion during proposal **evaluation**

Articles¹ & performance indicators² in the **grant agreement**

Periodic reports to the EASME

Communication, dissemination and **exploitation** activities

EASME's **policy feedback** activities

¹ see Article 20 (Reporting), Article 23 (Evaluation of impacts), Article 28 (Exploitation), Article 29 (Dissemination and exploitation)

² see Annex 1 Part B of the Grant Agreement

Typical challenges

- Capacity & skills within the team
- Clearly describing the chain of expected effects resulting from an action
- Appropriate evaluation approach
- Ability to measure and quantify
- Knowing the baseline, good assumptions and data
- **Monitoring system:** data collection, bias, sampling, sample size, response rate
- **Attribution/additionality:** correlation vs causation, project vs no project
- **Reporting:** correct calculations, conversions, units
- **Time gap** between implementation and evaluations

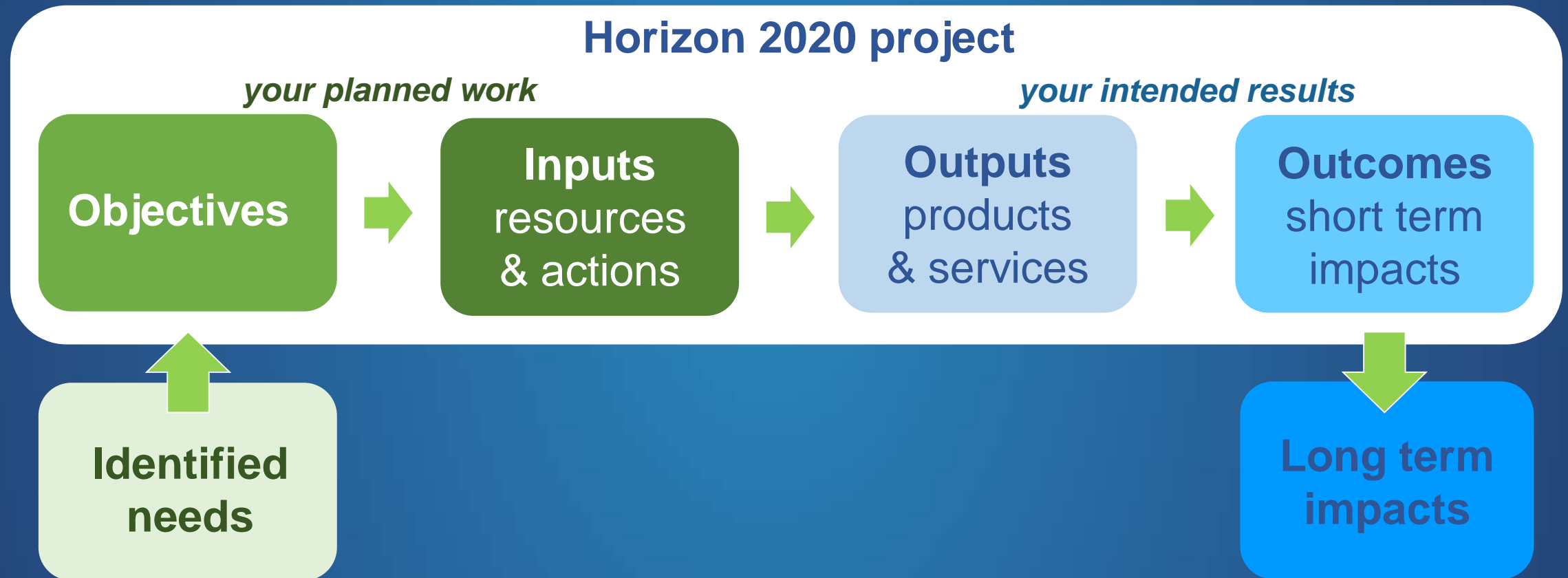
Frequent 'evaluation' concerns

- It's complex
- It's just another task on top of all the others
- It requires too many resources
- We might not get it right
- The approach might not be accepted

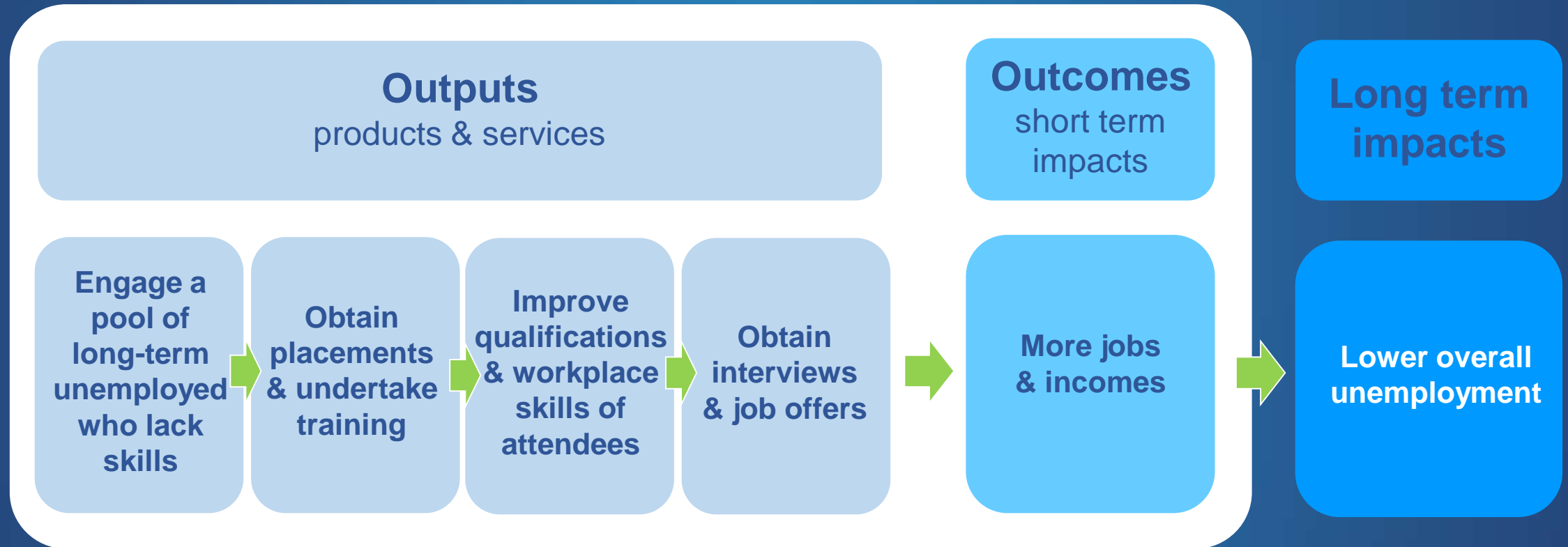


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Impacts – the logical conclusion of activities



Logic model: Job training scheme



Job training scheme: Monitoring data

Component	Type of data	Why this data might be useful
Inputs resources & actions	Funding or staff numbers Referrals & waiting times	<p>This can inform a cost-benefit analysis and determine whether assumptions about the policy implementation, such as cost and time, were correct.</p> <p>This can help determine whether the policy is being implemented correctly or whether there are any unintended consequences.</p>
Outputs products & services	No. / characteristics of the people accessing the service No. of job interviews / no. of applications processed	<p>This can help demonstrate whether a policy is reaching its target population.</p> <p>This can inform an assessment of whether the programme has delivered the target outputs to the anticipated quality.</p>
Outcomes short term impacts	Employment rates & wages	<p>This will help to measure the benefits of delivering the outputs.</p>

My to do list

- ✓ *Identify & review the main impacts*
- ✓ *Monitor & evaluate*
- ✓ *Document impacts in 'Periodic Report'*
- ✓ *Justify my choice of baselines, benchmarks, assumptions, references & calculations*
- ✓ *Consider to what extent impacts are a result of our activities*
- ✓ *Review (& revise if necessary) our approach*
- ✓ *Take actions to exploit our results*

Don't forget indicators in the Participant Portal:

SyGMa System for Grant Management		Project Continuous Report										goFund EU FP7 Funding Partnerships Guide	
680441 (InDeWaG)	IA	Summary for publication	Deliverables Ethics, DMP, Other Reports	Milestones	Critical Risks	Publications	Disseminati...	Patents (IPR)	Innovation	SME Impact	Gender	Energy	ABS Regulation
 THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION HORIZON 2020	Call: H2020-EE-2014-2015 Topic: EE-02-2015 Unit: EASME/B/01	✓			✓	✓	✓	✓	✓	✓	✓	✓	

- Scientific Publications
- Dissemination and communication activities
- People trained / stakeholders reached
- Intellectual Property Rights (IPR) acquired

- New Products, Processes, Methods
- Primary energy savings & energy investments triggered*

* Do not leave empty – if nothing triggered then values should be zero.

Indicators

- Nb. of training courses: new / upgrade existing course, new / upgrade existing qualification, by professional profile
- Nb. of people trained, certified/recognized, hours taught by course profile
- Nb. of people targeted through awareness raising campaign (beware of double counting!)
- Nb. of policy measures (describe scope, reach, level of commitment...)
- Cost of trainings
- During the project and beyond (= exploitation strategy!)
- Document consistently in different countries (same methodology)

Training: what - how

- Blue collar workers: apply specific knowledge, but also importance of collaboration (understanding of the work done by others), also softer skills (use of digital tools)
- White collar workers: better understanding of the building as a system, better guidance given to other trades
- Plan your pilots carefully – allow time for validation and (multiple) feedback loops – content, approach, impact

More than impacts

- Consider qualitative & quantitative aspect (incl. EE, RES)
- Recognise the complexity: Problem -> implications -> training -> efficiency / effectiveness -> adoption in working environment -> scale / effectiveness
- M&E strategy: before, during, after training
- Aim for high response rate: planned, up-front, timely, easy
- Proof / correct / refine assumptions
- More than impacts: use insights to develop your offering

Thank you

Background slides

Are outcomes / impacts linked to the project?

Also referred to as 'attribution' - ask yourself:

1. Could it be a coincident?
2. Are there other initiatives / project going on at the same time?
3. Was the selection of participants biased?
4. Are there 'natural' underlying market developments?
5. Is it difficult to identify targeted and not targeted groups?

Refer to 'contribution' when attribution to impacts / outcomes cannot be quantified.

Are outcomes / impacts a result of the project?

Also referred to as 'additionality' - ask yourself:

1. Would people in the target group have acted anyway?
2. Are people benefitting who are not in the target group/area?
3. Are benefits offset by negative effects elsewhere?
4. Does the project substitute external activities by others / in other areas?
5. Does the project have other knock-on effects (positive or negative)?
6. Will activities continue after the project ends? - This links to the project's exploitation plan / activities.