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
Horizon 2020 project

**Identified needs**

**Objectives**

**Inputs resources & actions**

**Outputs products & services**

**Outcomes short term impacts**

**Long term impacts**

**Impacts – the logical conclusion of activities**

*your planned work*

*your intended results*
Logic model: Job training scheme

**Outputs**
- Engage a pool of long-term unemployed who lack skills
- Obtain placements & undertake training
- Improve qualifications & workplace skills of attendees
- Obtain interviews & job offers

**Outcomes**
- More jobs & incomes
- Lower overall unemployment

**Long term impacts**
- Lower overall unemployment
## Job training scheme: Monitoring data

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

- 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.