MEDICI
Mapping Digital Inclusion

Mapping the Evolving Digital Inclusion landscape to support Cohesion and Integration

TRANSFERABILITY TOOLKIT
SECTION 5: EVALUATION AND SUSTAINABILITY

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SUMMARY

The MEDICI Transferability Toolkit aims to help stakeholders working in the field of digital inclusion for vulnerable groups apply the good practices in the MEDICI Catalogue to design and implement effective interventions to support digital inclusion. It is essentially a 'User Manual' – or 'Handbook' - that provides Guidelines, procedures, tools and practice examples to support the successful transferability and implementation of the MEDICI good practices within organisations who work with vulnerable groups.

The Toolkit approach is based on 'Ten Steps to Transferability' each of which takes the reader through the process of developing and customizing the digital inclusion project to suit local needs, from familiarization with the good practice cases contained in the MEDICI Catalogue, through adaptation and customisation to evaluation and sustainability.

Ten Steps to Transferability

Each step involves a 'primary task' which in turn links to activities that are required to complete the task. To support Toolkit users in completing the task each step provides:

- guiding principles to perform the task;
- a checklist of activities to be carried out;
- pitfalls and trouble-shooting tips, including good practice examples of how to carry out the task and activities successfully;
- list of resources (from the 'Resources' folder on website) to support the task and activities.

The ten steps are incorporated into five sections (chapters). The section you are about to read, entitled **Evaluation and Sustainability,** is made up of two steps:

Step 9: **Evaluating and Learning from the project**

Step 10: **Replication and Sustainability**

SECTION 5: EVALUATION AND SUSTAINABILITY

Step 9: Evaluating and Learning from the project

Primary Task of this Step

The Primary Task of this Step is to design and implement an evaluation plan for your digital inclusion project which will support progress monitoring and the collection of evidence of whether and in what ways the project works, for whom and under what circumstances.

Guiding Principles

- Evaluation should be used not just as a retrospective tool to assess performance at the end of the project, but should be embedded within the project process from the start to support a cycle of continuous learning and improvement;
- This means that evaluation should be used for four main purposes: a *developmental* purpose - to support the project design and implementation plan (ex-ante evaluation); an *operational* purpose - to help the project keep track of how it is progressing (on-going or 'formative' evaluation); a *summative* purpose - to help the project measure what is has achieved (ex-post evaluation); a *sustainability* purpose - to help key actors in the project learn from their experience;
- There are many different methods and tools for collecting and analysing evaluation data. Each has different purposes and different resource and skills requirements. The evaluation design and plan should take into account 'pragmatic' considerations: the 'object' of the evaluation; the purposes of the evaluation; the resources available to carry it out; who the evaluation audience is and what are their expectations; what evaluation skills are available in the project, or can be brought in from outside; how long is the timeframe for the evaluation and what is it likely to cost;
- The evaluation should not just reflect the 'expert' view but should take a 'participatory' approach - trying to ensure that the voices of different stakeholders and their perspectives are represented – particularly those who have less power and whose voices are not often heard;
- This means that as far as possible evaluation data should be drawn from different sources and from different perspectives, and compared against each other, through 'triangulation', so that the evaluation reflects a balanced viewpoint;
- A project works – or not - by enabling participants to make different choices, so a key objective of evaluation is to capture how and why these choices are made.

Checklist of Actions

Identify the evaluation purposes, timeframe and modes of operation	☐
Decide on who the audiences are and what are their expectations	☐
List the evaluation questions the evaluation will answer	☐
Decide on the methods to collect and analyse the data	☐
Decide on the indicators to measure results	☐
Work out what resources you need to do the evaluation	☐
Produce a plan to carry out the evaluation and assign tasks and roles	☐

Tools to help you evaluate your project

Theory of Change

In Step 1 we demonstrated how Theory of Change can help to shape the project design. Theory of change is also one of the most powerful tools to evaluate the project because:

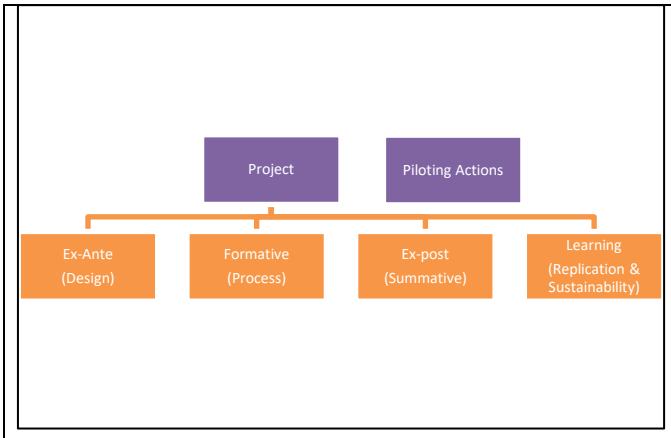
- It shows the expected project change journey from the challenge it is presented with at the start of the journey to where it hopes to be at the end
- It sets out the project inputs, outputs, outcomes and impacts and the connections between them
- It specifies the hypotheses and assumptions of the project – in particular its expected 'causal chains' - if we take Action 'X', this will produce Output 'Y', which will then lead to Outcome 'Z'.

Essentially, what evaluation does is to test this Theory of Change by gathering evaluation data over the life cycle of the project, to see whether these expected hypotheses and assumptions work, and are supported by the evidence.

Using the Theory of Change, you can:
Work out which 'modes' of evaluation you need to apply and when (developmental, process, summative)
Identify which activities are critical for evaluation
Work out how you will measure outputs, outcomes and impacts
Periodically use the Theory of Change to monitor how far your project is progressing in its 'change journey'
Review the Theory of change at project end to assess how far the project has progressed

Evaluation Design Template

Evaluation has four main purposes. These correspond to different evaluation 'modes' and need to be applied at different stages in the project. They are: a *developmental* purpose - to support the project design and implementation plan (ex-ante evaluation mode); an *operational* purpose - to help the project keep track of how it is progressing (on-going or 'formative' evaluation mode); a *summative* purpose - to help the project measure what is has achieved (ex-post evaluation mode); a *sustainability* purpose - to help key actors in the project learn from their experience (learning mode). These need to shape the evaluation design.



Just as the project being evaluated has a life cycle and progresses through different stages, so does its evaluation, and the methods and tools appropriate for each stage of the evaluation differ. The key stages of the life cycle of an evaluation are:
Stage 1: Mapping and planning
Stage 2: Implementation
Stage 3: Reporting and dissemination

Stage 1: Mapping and planning

At the outset, the evaluation needs to identify: what are the purposes of the evaluation, who are the audience, and what kinds of things need to be focused on. It also needs to consider the logistics of carrying out the evaluation: what are the settings in which evaluation will be carried out; what people are available to implement it and what skills are available; what communications channels need to be put into place. Following this initial assessment, and evaluation plan should be drawn up which will outline the evaluator's decisions on the choices available.

Sage 2: Implementation

Having developed an evaluation plan, the next stage of the evaluation will inevitably focus on carrying that plan out. The main stages involved in implementation are:

- Establishing the evaluation criteria that need to be assessed
- Deciding on what methods and techniques are to be used for data capture
- Managing and co-ordinating data collection, including analysing the results

Stage 3: Reporting and Dissemination

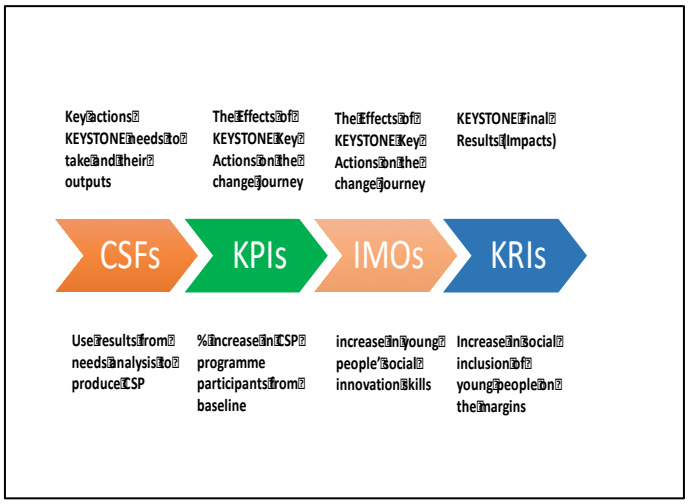
Dissemination should not be restricted to the circulation of a final report - especially in the case of 'developmental' evaluations. Different stakeholders may require different communication approaches. These might include:

- Short summaries of the evaluation, tailored to different audiences
- Journal articles for other researchers
- Topical articles in the trade press/social media/blogs
- Workshops for specific audiences
- Feedback seminars for key decision-makers.

Developing Indicators

Measures to evaluate impact require the careful creation of indicators. There are four main types of indicator:

- Critical Success Factors (CSFs);
- Key Results Indicators (KRIs)
- Immediate and Intermediate Outcomes (IMOs) and
- Key Performance Indicators (KPIs)



CSFs are the critical areas whose success is important and also the steps taken to succeed

KRIs measure the effects of these steps at the end of the project (impacts)

IMOs measure the outcomes along the way

KPIs make the connection between the CSF's and the IMOs. They track the ***actions*** between the CSF's and the IMOs and assess progress towards final results

A project evaluation needs to combine all four elements in order to assess the success of the project - looking at the big 'wins' at project end; the critical success factors that are needed to make these happen and the key performance indicators that can tell us how we are progressing on the journey towards achieving the desired project results. In between we need to measure two kinds of outcomes:

- Immediate Outcomes – changes in awareness, attitudes and knowledge
- Intermediate Outcomes – changes in behaviours and structures.

The CSFs, KPIs, IMOs and KRIs need to be aligned with the project 'Theory of Change'.

Process dashboard

The Process Dashboard has four purposes: i) to enable monitoring of project progress set against key progress indicators, or baselines ii) to provide a picture of where the project is in relation to the 'change journey' specified in the 'Theory of Change' (and also to review whether the underlying assumptions and hypotheses embedded in the project ToC hold true or need revision) iii) to feed data into the overall summative (outcomes) evaluation of the project iv) to stimulate review and learning as the project develops.

The Dashboard is composed of Key Progress Monitoring Indicators – a list of baseline core outputs defined as 'evidence of success', that together build up a snapshot at a point in time of the extent to which the project is meeting its planned operational objectives. The dashboard and associated indicators are regularly monitored and updated in line with the project and

evaluation life cycle. An integrated spreadsheet containing the process monitoring data can be uploaded to a sharing platform like Google Docs. Data entry and updating enables a 'snapshot analysis of progress to be carried out, which provides a set of time series assessments that ultimately feed into the overall summative evaluation of the project. In addition, it should include the KPIs developed for the evaluation.

An example of a Process Dashboard is shown in the Table below.

Dimension	Indicators	Status at: (date)	Project target
Research	No. target group involved in lifeworld analysis		
	No. Stakeholders mapped		
Development	No. of training units completed in digital skills project		
	No. of Action Learning Sets implemented		
Piloting	No. target group recruited to project		
	No. target group starting project		
	Dropout rate of project		
Dissemination	No. visits to project website		
	No. brochures/leaflets distributed		
	No. contacts on social media		
	No. attendees signed up for seminars		
KPIs	% stakeholder survey target reached		NA
	% target of project participants reached		NA
	Change in website visits		NA
	Change in social media contacts		NA
	Growth in partnerships and networks		NA
	% project output target achieved		NA

NA = Not applicable. KPIs do not have targets. They measure progress towards a specified target from a particular baseline.

Pitfalls and how to avoid them

- Try not to be too 'scientific'. Everyone likes 'numbers' – particularly project funders who typically require evidence that their investment shows value for money. However, a digital inclusion project is not a new anti-inflammatory drug. It's a complex social intervention. 'Experimental' evaluation methods – like randomized control trials – won't work with complex social interventions. Be pragmatic and realist. Use Theory of Change.
- Know your limitations – make sure you have included in your evaluation design and plan estimates of the resources and skills required to carry out the evaluation. Be aware that some evaluation techniques – like ethnographic work and case studies – are more resource-intensive than 'cheap and cheerful' methods like surveys.
- Avoid evaluation suspicion and resentment – many project users and stakeholders see evaluation and performance assessment as the same thing. Make sure you explain to all involved that evaluation is about learning, not performance. Get people on board by using a 'participatory evaluation' approach so all user and stakeholders 'own' the evaluation.

- Don't be afraid to measure shortcomings and to report on where the project objectives fall short. Learning from failure is as important as learning from success.
- Choose data collection tools and design data collection instruments that will appeal to your evaluation participants. For example, if you survey young people, do it through a social media platform they're familiar with.
- Be SMART – design indicators that are Specific, Measurable, Achievable, Relevant and Time-bound.
- Produce results that are relevant and usable – the main objective of evaluation is to learn. Make sure the learning from the evaluation feeds into ongoing project monitoring – so you can take remedial steps if necessary – and into the sustainability plan for the project.

Resources

- A presentation explaining the use and design of theories of change for different contexts: https://www.cecan.ac.uk/news/cecan-seminar-theory-of-change
- Digital Inclusion Atlas: Qual and Quant Evaluation Report Template_Project Oracle
- Digital Inclusion Atlas: Quantitative data analysis_Project Oracle
- Digital Inclusion Atlas: Self-Evaluation Template_2018_Project Oracle
- Better Evaluation - Monitoring and Evaluation Toolkit: https://www.betterevaluation.org/en/toolkits/equal_access_participatory_monitoring
- NESTA - DIY Evaluation toolkit: https://www.nesta.org.uk/toolkit/diy-toolkit/
- Design Kit - Field Guide to Human-Centered Design: https://www.designkit.org/resources/1
- Project Oracle Resource Library (including the Self Evaluation template that is on the Medici KC): https://project-oracle.com/resource-library/evaluation-planning
- DMSS – Project Evaluation: A Practical Guide Parts 1, 2 and 3: https://www.dmss.co.uk/pdfs/Part-1-Project-Planning-and-Evaluation.pdf
- https://www.dmss.co.uk/pdfs/Part-2-Collecting-and-Analysing-data.pdf
- https://www.dmss.co.uk/pdfs/Part-3-Commissioning-an-independent-evaluation.pdf
- EES – gLOCAL evaluation week: https://europeanevaluation.org/events/glocal-evaluation-week-2021/

- EES – Access to People and Data webinar: https://europeanevaluation.org/events/access-to-people-and-to-data-2/
- UKES annual conference: https://www.evaluation.org.uk/event/annual-conference-2021/
- Better Evaluation – Coffee Break webinars (these are past events but may be useful?): https://www.betterevaluation.org/en/events/coffee_break_webinars_2013

Step 10: Replication and Sustainability

Primary Task of this Step

The primary task of this step is to plan for the sustainability of your project by using the evidence from the project evaluation – Step 9 – to show how it can be scaled up and out – i.e. expanding the project, transferring it elsewhere or applying it in another context – and exploring ways of funding the project or similar projects in the future.

Guiding Principles

- Replication means getting evidence to show that the project doesn't only work in one place or at one time. Although it may not be necessary to expand or transfer the project, you may need to demonstrate that it can work for different groups of people in other locations or in other contexts, for example to support further funding applications. This requires using the evaluation evidence from Step 9 to show what works, for whom under which circumstances.
- Stakeholders who may have an interest in providing resources to ensure future continuity of the project need to be persuaded by strong evaluation evidence that it works and provides value.
- Sustainability means planning for this future continuity by analysing the economic, financial and social returns that the project can deliver and exploring potential sources of funding and other resources that can support the long-term implementation of the project.
- Sustainability planning should start early on in the life cycle of the project. Avoid bolting on a sustainability plan at the end. Planning for the future could cover identifying and networking with potential key stakeholders, ensuring robust evaluation is taking place and identifying possible future funders.
- Make sure you engage key stakeholders in the planning for replication and sustainability. The stakeholder mapping work covered in Step 2 will help you identify which stakeholders are likely to want to get involved in future project expansion or replication.
- Sustainability planning requires skills in economic and financial analysis. You may need to bring these skills in from an external source.

Checklist of Actions

	☐
Produce evaluation report on evidence of project effectiveness	
Decide on need for scaling up/out	☐
Review stakeholder map from Step 1 to identify potential partners	☐
Carry out replication analysis	☐
Carry out economic and financial analysis	☐
Produce replication and sustainability plan	☐

Tools to support replication and sustainability

Replication Analysis Tool

Replication can be understood as a process of taking a product, service, model or even information into a different setting (context) or to a different target group than the one it was originally developed for. This process is also sometimes referred to as 'scaling out' and is different from 'scaling up' which tends to involve increasing the volume of what is delivered.

Replication tends to be a three-stage process:

- Knowledge and awareness stage: In order to replicate or adopt an innovation, it needs to have been shown to meet needs, to be effective and to be known by those considering adopting it.
- Choice and decision stage: this involves relevant actors making choices about the replication destination, the process of doing this, and how it will be financed. Both of the first two stages benefit from the existence of evaluation and / or cost-benefit data.
- The final implementation stage involves taking the product, service or other innovation into one or several other contexts – e.g. adapting a project developed for young migrants to support people with disabilities.

This tool supports the first stage of this process, in order to inform the next stage – helping to inform your decisions about how to scale out your project. It provides a checklist of the questions that need to be answered to assess the 'replication readiness' of your project.

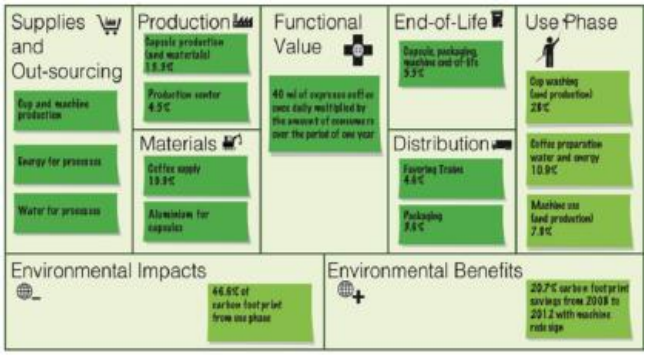
Intervention (project) features and design	
What is the nature of the project?	Straightforward design with a logic model and/or a manual describing it and how it should be implemented. Straightforward / simple design that is well explained – but no manual. Several activity strands, no logic model or manual that describes the project and there are several hard to define components
How much do you know about what the essential parts of your project are that make it successful?	No knowledge about which parts make the intervention successful. Some knowledge (e.g., from introducing the project into different contexts or theory of change) Strong evidence and evaluation-based knowledge about aspects of the intervention that are responsible for its impact
Will your project work in other contexts?	The project is culture or context specific. There is some evidence of the project working elsewhere. There is strong evidence that the project will work elsewhere
What evidence do you have that that your project has an impact?	The impact is unknown or unclear. Reasonable evidence from evaluation or other measurement Strong and rigorous evidence from rigorous evaluation relevant to the scale and nature of the intervention.
Replication plans, strategies and structures	
What is the main reason or motivation to replicate the intervention?	To increase scale: does the delivery setting allow rapid scaling? To increase financial returns: is there robust cost / benefit data? Other reasons: please specify
What is your business model for replication?	No business model. Outline business model

	Detailed business model
How are you planning to deliver the project in another context?	Via direct delivery Via indirect delivery A third party will deliver it
Is there a clear owner of the replication project?	No Yes - there is one individual with relevant skills and experience Yes, the project owner is an experienced individual with previous experience in scaling and is trusted by stakeholders.
What understanding and evidence do you have of the match between the social, economic and environmental needs of the local and replication contexts?	No understanding Some understanding In-depth field research implemented to understand differences and similarities in needs
What evidence do you have of the supply or people or organisations willing to deliver the	No interested parties or only some initial contacts There is evidence of a supply of people or organisations willing and qualified to take on the replicated project There is strong evidence of several people or organisations eager and qualified to take on the replicated project
Organisational culture, capability, capacity	
Are the functions and organisational values necessary for replication (relating to process, systems, training, legal agreements, procedures and ensuring quality) well defined and	No Yes, a few are defined and developed Yes, most are defined and developed Yes, all are accurately defined and developed
What is the quality of staff involved in the replication effort?	They generally display a low level of curiosity, and willingness to learn. They display some degree of curiosity, and willingness to learn They display a high degree of curiosity, and willingness to learn and may have prior experience of replication
What is the seniority of staff involved in the replication effort?	mainly junior and not able to take many autonomous decisions have some degree of autonomous decision-making ability sufficiently senior to work autonomously and take decisions
To what extent are organisational and project technologies transferable to different contexts?	They are specific to the context in which they were created. With some changes, they can be used in different contexts.There is evidence to show that they can be used in a different context.
What is the nature of communication patterns within the project and with external stakeholders?	Communication is siloed and technocratic. Cross team communication is possible but not 'habitual' Individual, team and cross team communication patterns are fluid
To what extent do staff and external stakeholders support replication?	Most are hostile to replication Most are supportive of replication All are supportive of replication
Is the brand understood and valued by your audience (beneficiaries, customers, funders etc.)?	No or very little understanding Brand is partially understood and valued Brand and organisational values are clearly documented.

Source: Tavistock Institute/Designscapes

Business Model Canvas

A business model describes how an organization creates, delivers and captures value. It's a visual template that can be used to outline key elements of a business model. The most commonly used model – the 'classic' model – focuses essentially on financial aspects (Osterwalder, 2010). They show things like key partners, key activities, key resources, customers, costs and revenue streams. Other models are adapted for service delivery projects (Jukka and Katri Ojasalo, 2015), whilst others reflect 'social returns' – i.e., benefits that may not have a purely financial value but can be 'monetised' in terms of the contribution they make to the social good including social and environmental impact (Joyce and Paquin, 2016).



The 'triple layered' business canvas model shows not only typical financial aspects of the project – like costs and revenues – but shows the social and environmental benefits of the project, as well as possible negative impacts, for example its carbon footprint

Source: Joyce and Paquin, 2016

An example of a 'triple layered' business canvas model is shown for a digital skills Lab for disadvantaged young people in London in the illustration below.

<table>
<tr>
<td rowspan="2">Key Partners
Community Trust Centre

They provide premises, services, access to clients and networks of other partners

These key partners are already trusted by users and already provide services</td>
<td>Key Resources Required:
Skills and Knowledge:
From us – competence in digital skills, design thinking, social innovation, action research.
From partners – mentoring, digital skills, creative skills (e.g. drama; film-making); adventure activities.
From users: commitment, open-mindedness</td>
<td rowspan="2">Value Proposition
The digital skills Lab expands Young People's horizons and gives them the skills to improve their employment opportunities, including becoming digital social innovators. It adds value to the offer currently being provided by youth services in the area.</td>
<td>Value Creation
The Lab addresses challenges for young people highlighted in the 'Lifeworld Analysis'. It provides a space to surface and nurture the talents of young people.</td>
<td rowspan="2">Customer's World
Understanding of customer's world – form LWA. They need new horizons, new skills, new opportunities in a trusted and supportive space.

What does customer buy – services buy design thinking, social innovation expertise and access to new networks.
Young people buy adventure, new horizons, new skills.</td>
</tr>
<tr>
<td>Mobilising Resources and Partners
Multi-party value creation – agreement to partner with</td>
<td>Interaction & Co-production
Customer co-production: Design Thinking Lab support co-productions of</td>
</tr>
</table>

	SCT/MLC – or joint venture. Capitalise on projects – Innovate UK grants; Strength in Places FUND; Erasmus+ Mobility		action research projects & development of Apps	
Cost Structure Our costs: building (0 or nominal rent); staff (1 FTE youth worker - £35K p.a.; volunteers £0); fees for mentors/role models - £10k p.a.); equipment – tablets; software - £10k start-up costs); adventure activities - £10k p.a.); promotion – advertising, social media - £2k p.a. Customer costs – young people: direct (£0); indirect – time, commitment, opportunity cost. Service providers – membership fee and/or fee paid per workshop project activity			**Revenue Streams** Earnings logic: mixed-revenue generation model (grants from UK/EU projects –- charitable donations; fees from service providers; income from innovations/Apps developed; service provider certification; crowdfunding Other value: social return on investment (SROI). Assuming 20 young people p.a. graduate from project, and half of these change 'NEET' status – reduction in average costs to state of £144,380. Potential reduction in costs of youth offending/anti-social behavior: £36,200. Potential reduction in costs of drug misuse: £168,940	
Environmental Impacts Negligible. The Lab adapts to existing space and infrastructure. No envisaged increase in carbon footprint			**Environmental Benefits** The Lab works to provide solutions on reducing carbon footprint	
Social Impacts None envisaged			**Social Benefits** Reduction in costs associated with changing NEET status, reduction in youth offending and ASB, reduction in costs of drugs misuse (based on 10 young people p.a.) =£349,520 Increase in civic and social participation of young people in the area Increase in young people's competences, adding value to their 'marketability' and increasing their life chances Increase in social capital and resilience in local communities as a result of young people providing solutions to 'what's broken' Increase in relevance, quality and effectiveness of youth services provided in the area	

Pitfalls and how to survive them.

- Over-ambition – many an enterprise has failed because it expanded too much and too soon. There is no absolute reason why a successful project deserves be scaled up and out. The case for replication should be carefully examined – by assessing level of demand and user need, stakeholder interest and the support available from the external environment – before going ahead with a replication strategy.
- Lack of evidence – you need to have credible and plausible evidence of value to develop a replication and or sustainability plan. This highlights the importance of developing and implementing an effective evaluation effort as an ongoing feature of the project development and implementation process.
- Lack of interest – there are many worthy and effective projects for the digital inclusion of vulnerable groups out there, which makes for significant competition. Successful replication and sustainability strategies are those that have stakeholder buy-in – not only from funders put potential project partners and users. You need to cultivate and work collaboratively with potential stakeholders early on.
- Lack of technical resources and expertise – assessing replication readiness and sustainability potential, as well as developing a business case for a project, takes significant technical know-how and resources. You need to ensure these are in place – either in-house or imported – to develop successful replication and sustainability plans.

Resources

- Online replication readiness test developed by Spring Impact: https://toolkit.springimpact.org/Home
- A guide suggesting different ways to prepare for enhancing the replicability of proven or evidence based projects:
- https://www.childtrends.org/wp-content/uploads/2007/10/Seven-Activities.pdf
- Slide presentation on understanding replication as a continuous improvement process: http://slideplayer.com/slide/3736009/
- Medici Final Conference: final session on sustainability https://digitalinclusion.eu/final-conference/
- Social business model canvas: https://socialenterpriseinstitute.co/wp-content/uploads/2018/12/Social-Business-Model-Canvas.pdf
- Setting up a digital national coalition: https://www.coalitions.digitalinclusion.org