ROTARY IMPACT HANDBOOK

Using Measurement in Your Service Activities to Demonstrate Your Results

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HOW TO USE THIS HANDBOOK

As we work together to make a difference in communities, we want to better show people the lasting changes that Rotary members make in the world. Measuring our impact means we gather the information that allows us to do that.

This handbook will help you plan how you'll use measurement methods for all the service projects you carry out, whether they're funded by your club, your district, or The Rotary Foundation.

You'll find information about different approaches to measurement, practical examples, proven methods, and space for you to record your ideas or practice using the concepts. This will help you learn to plan and measure your projects and collect more relevant data.

Data is a powerful tool to help us learn what's working and what isn't. It also lets us create and share compelling stories about Rotary that propel people into action. Showing our impact through data can lead to new partnership opportunities and funding, attract new members, and forge stronger relationships in the communities we work with.

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TERMINOLOGY

When we talk about project measurement, we use some terms to describe specific concepts. Here are some of the key terms you'll encounter:

Baseline: The data you collect before the start of a project, such as during the community assessment. As you then collect more data, it serves as a reference point you can compare things to in order to measure your progress toward the project's goals.

Endline: The data you collect at the end of a project. Comparing it to the baseline data enables you to describe the progress or change over the duration of the project.

Impact: The positive, long-term change resulting from our actions. These are measurable improvements that wouldn't have occurred otherwise.

Indicator: A measurable data point that provides evidence of progress and change related to a specific outcome or goal of your project.

Input: The funding, time, training, or other materials that we invest in a project.

Measurement: The process of assessing specific indicators using standard methods.

Monitoring and evaluation: The systematic process of gathering and tracking data to assess the progress and performance of your project.

Outcome: The intermediate results of our actions, such as changes in attitude or behavior in the target population.

Output: The immediate results of activities that have taken place, such as the number of people trained or the amount of materials delivered.

Sustainability: The capacity for outcomes to be maintained locally and to serve the community's continuing needs.

Theory of change: An explanation of how a project will achieve the intended impact and in what circumstances. Among other things, it includes an assessment of the current situation and the proposed activities, inputs, outputs, outcomes, and impact.

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A NOTE ABOUT THE TERM *IMPACT*:

In Rotary, when we talk about project measurement, the term *impact* refers specifically to the positive, long-term change that results from our actions. This change is also closely aligned with a broader long-term goal. For example, many global health projects are aligned with the UN Sustainable Development Goals. In Rotary, many projects are aligned with the Foundation's mission statement and our areas of focus and their goals. The goals of each area of focus also reflect the UN development goals.

Having an impact is the ultimate aim of your project, which you reach by first accomplishing the project outcomes. **Think of it this way: The outcomes represent the journey people are on, and the impact represents the destination.**

Measuring impact is a complex and long-term process. It often can't be determined during the duration of a service project. More often, you reach your planned outcomes through the activities you included in your project. Measuring along the way helps you learn what's working, what isn't, and lets you adapt as needed.

As an organization, understanding and measuring our impact is crucial for us to ensure that our resources are allocated appropriately and to assess the effectiveness of our project activities.

Examples of measurable impact:

- A documented long-term reduction in maternal morbidity and mortality
- A quantifiable reduction in gender disparities in education
- A reduction in the incidence of diarrheal disease
- A reduced rate of deforestation
- A higher proportion of bodies of water passing a water quality test

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MEASUREMENT AND WHY IT MATTERS

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IN THIS CHAPTER, WE'LL FOCUS ON:

- ➔ Why tracking your progress systematically is important
- ➔ When to collect measurements
- ➔ Who engages in monitoring and evaluation

WHY IS MEASUREMENT IMPORTANT?

Collecting and using measurements helps you track the progress of your project, adjust course if necessary, and provide evidence of your success. In more detail, this:

- **Promotes accountability** by letting you gauge whether you're progressing toward the project outcomes. This allows you to report your accomplishments with confidence or shows you that you need to make adjustments.
- **Fosters recognition** by giving you the chance to promote credible results. Sharing these achievements encourages other Rotary members, potential partners, and community members to support similar projects or other club initiatives.
- **Builds knowledge** in your club and throughout Rotary. By collecting and analyzing data, you gain valuable insights about what strategies worked and what did not, which can help your club and other clubs be successful with similar projects.
- **Increases sustainability**, because you're regularly assessing the effectiveness of the project activities. This can lead to better decisions about allocating resources and investments for long-term success.

Documenting and sharing proven project results can help your club:

- Gain more attention
- Attract members
- Secure funding
- Forge new partnerships

Demonstrating your successes through evidence instills confidence — both inside and outside of Rotary.

Remember that all projects, large or small, benefit from using measurement.

MEASURING PROGRESS

The information you collected as part of your community assessment establishes your baseline data and lets you set benchmarks. The community assessment will help you describe the situation before the project began. Your intermediate and ending measurements will help you understand the progress made during the project and when it's complete.

WHEN DO YOU START YOUR PROJECT MEASUREMENTS?

Imagine that your club has heard from teachers in a community in Cambodia that primary school students are missing classes. Your club members are concerned and want to better understand why this is happening to determine if the club can help address the problem.

You and your fellow club members begin by conducting a community assessment with local representatives including school administrators, teachers, parents, students, and other community representatives including local health clinic workers. You confirm that students are missing school and learn that the health centers are treating more cases of diarrhea and dehydration in children. The people you speak with believe that the hygiene conditions at school may be contributing to the spread of disease.

You begin to observe and document the environmental conditions, water and sanitation service levels, and hygiene practices at school. These include the access, availability, and quality of water; access to improved sanitation; the availability of soap; the presence or absence of hand washing stations; and students' hand washing practices after using the toilet and before eating. The school shares data on the number of student absences due to sickness from the past 12 months and the health clinic shares the number of children it has treated for diarrhea from the past 12 months.

Based on the results of the assessment, the community representatives and your club members propose a project that focuses on increasing the use of hand washing at the proper times to prevent disease and improving access to hygiene facilities in schools.

During the planning process, you and the other club members outline the intended outputs (the immediate results of activities that have taken place), such as the school getting connected to the municipal piped water supply, the number of new hand washing facilities installed, the number of teachers trained in the national hygiene curriculum, and increased awareness among children about why hand washing is important. You also decide on your desired outcomes (the intermediate results of our actions), such as improved access to safely managed water services and more children washing their hands after using the bathroom and before eating, and align your project goals to the water, sanitation, and hygiene area of focus.

As you begin to implement this project, you'll need to know:

- ➔ Whether the project is proceeding as planned
- ➔ If you're making progress toward your stated outcomes and goals
- ➔ If you need to rethink any strategies to reach the target population
- ➔ What to say about your achievements once the project is complete

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MEASUREMENT AND WHY IT MATTERS

You can gather information that will let you answer these questions by setting up a measurement plan that explains how you'll track the project's progress toward its intended outputs and outcomes.

Over the next few years, you'll want to collect data to assess whether school absences due to illness and the incidence of diarrhea in school-age children are decreasing.

WHAT IS MONITORING AND EVALUATION?

Monitoring and evaluation (sometimes called M&E) is about how you measure whether a project is progressing as you expected and making the positive changes you intended. It involves gathering data, analyzing that data, and making informed decisions based on the evidence. By creating this kind of plan, you and your project team can clearly define your goals and specify how you'll measure your progress toward these goals. This helps you stay on track, measure your achievements, and identify any improvements necessary in how you're implementing the project to get better outcomes.

DEVELOPING A MONITORING AND EVALUATION PLAN FOR YOUR PROJECT

The process begins while you're **conducting the community assessment** to understand the current situation. During this process, you identify the community's assets and challenges to addressing the desired change. You begin to ask questions that help you **identify the underlying causes of the issue**. With this information, you can not only plan your project, you can establish a monitoring plan. This will include:

- **Setting a project goal.** This could be to improve the hygiene practices of school-age children in Koh Kong, Cambodia, in a measurable way.
- **Aligning your project with a larger, long-term goal.** This could be reducing the local incidence of diarrheal disease.
- **Determining the project inputs, outputs, and expected outcomes.** Using the results of the community assessment and your baseline data, determine the inputs, outputs, and expected outcomes that you'll measure while you implement the project.
- **Choosing indicators.** You could choose to measure the number of hand washing stations in schools, how many teachers are trained in hand washing practices, changes in hand washing behavior, or how often students are washing their hands.

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- **Deciding how you'll collect and analyze data.** You could use surveys administered before and after the training sessions or interviews with teachers, administrators, and community members to track the change in attitudes, knowledge, and abilities. Review school attendance records and public health data before, during, and after the project to find out whether school attendance has increased and the incidence of diarrheal disease in children has fallen.
- **Determining how often you'll collect data.** The frequency may vary by indicator and by how you'll use the information. You may need to count the number of teachers trained on a quarterly basis and track change in school absences on an annual basis.
- **Assigning responsibilities.** Clearly define who's responsible for collecting data, such as a project manager. You could also partner with a local nongovernmental organization that will collect data directly, or you could request data from another source.
- **Reporting your findings.** File any required reports if your project is supported by a grant, but also present your results at club meetings or district conferences.
- **Learning and adapting.** Think about whether there's anything you would change and where you can share what you learned. Save the data and assessments in your club records and use that information when you develop new projects.

WHAT ABOUT EVALUATION?

Although evaluation is a crucial component of the M&E process, we won't discuss it too much it in this handbook. Evaluation requires a comprehensive approach to assess the effectiveness, efficiency, and relevance of a project, and it typically takes place at specific points during the project or after it's complete. We'll focus our discussion here on measurement (such as gathering evidence that shows whether a project meets its intended outcomes). If you want to learn more about evaluation, consult the resources at the end of this handbook.

HOW THIS APPROACH WORKS IN ROTARY

Elements of this approach are already part of Rotary's recommended project planning process, including setting goals, describing the activities that will help you reach those goals, choosing indicators, describing how you'll measure your progress, and stating who will be involved. You can find more resources to help you develop your measurement plans at the end of this handbook.

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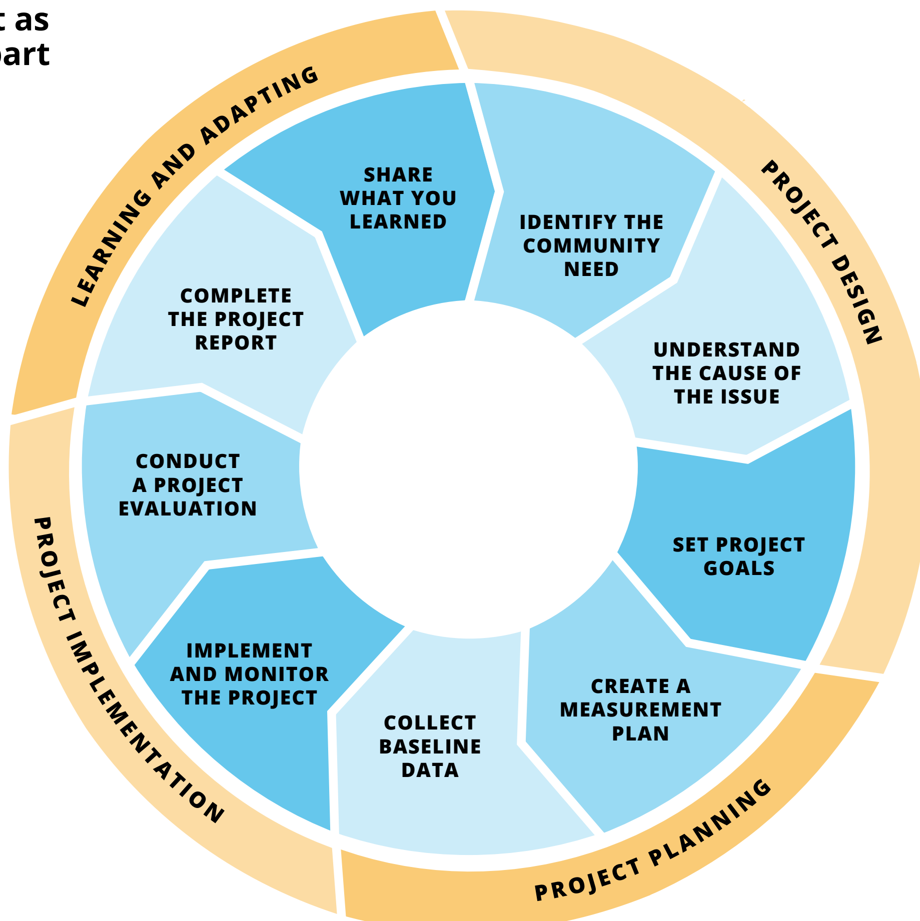
WHEN TO CREATE THE MEASUREMENT PLAN

Creating a monitoring and evaluation plan should happen early in the process of developing your project because it helps you clarify why you believe certain activities will contribute to achieving your goal. Being able to demonstrate the change brought about by your activities allows you to tell the story of how and what your project accomplished. The evidence you gather and the measurements you take help Rotary showcase the effect members have in their communities and around the world.

Measurement as an essential part of the project



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PUTTING A MEASUREMENT PLAN INTO PRACTICE

Think about one of your club's current projects or one that you're developing now. List ideas about how you can use measurement to support that project.

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WHO SHOULD ENGAGE IN MEASUREMENT?

Measurement is a collaborative effort by the whole project team, including project managers, Rotary members, cooperating organizations, implementing partners, and relevant groups in the community.

Engaging many different groups of people and organizations can make your planning and measurement efforts more meaningful and your project more sustainable. These relevant groups can include the people who directly benefit from the project as well as community leaders, government officials, local organizations, and donors.

Using the Cambodia example, who might you engage in your measurement efforts?

- ➔ School administrators
- ➔ Teachers and other staff members
- ➔ Students
- ➔ Parents and parent associations
- ➔ Government officials, such as from the health and education ministries
- ➔ Local education organizations
- ➔ Local scientific consultants

Each group will have their own thoughts, expertise, and interest in the project. It's important to seek their input during the community assessment because their perspectives can help you decide about project strategies and ensure that your measurements are relevant and accurate. Their involvement in collecting and interpreting data adds important local context and diverse insights, and it fosters a shared understanding of the project's inputs, outputs, and outcomes.

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PUTTING THIS INTO PRACTICE: IDENTIFYING RELEVANT GROUPS

Using the same example project, list the people and organizations that are important to your project.

List the people and organizations that should be informed throughout your project.

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CREATING A PATH TO YOUR GOAL

IN THIS CHAPTER, WE'LL FOCUS ON:

- ➔ Defining a theory of change
- ➔ Explaining why it's important for your project design and strategy
- ➔ Describing how to create a theory of change

WHAT IS A THEORY OF CHANGE?

A theory of change **explains the logic and the process** your project will use to get the expected results and achieve long-term change. After you've developed your theory of change, you'll be able to select indicators and the types of data to collect so you can determine if your project is making progress toward its intended outcomes.

The steps illustrated here are a key part of a theory of change. These elements — **input, output, outcome, and impact** — largely define your project strategy.

Building Blocks to Impact

INPUT
The funding, time, training, or other materials that we invest in a project.

OUTPUT
The immediate results of activities that have taken place, such as the number of people trained or the amount of materials delivered.

OUTCOME
The intermediate results of our actions, such as changes in attitude or behavior in the target population.

IMPACT
The positive, long-term change resulting from our actions. These are measurable improvements that wouldn't have occurred otherwise.

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THE VALUE OF A THEORY OF CHANGE

Your project strategy and your measurement approach are connected. What you plan to implement is what you'll measure to track progress toward your goals. Using a theory of change helps align your strategy and measurement and explains why you structured the project the way you did. By integrating your approach and measurement in a theory of change, you define the logic that supports your project through its implementation.

HOW TO CREATE A THEORY OF CHANGE

Developing a path for the hand washing project

Let's return to the hygiene project in Cambodia and discuss how to create a theory of change for it.

We know that the **desired impact** is to reduce the prevalence of diarrheal disease among children by a measurable amount. So we need to think about:

1. What are the intended **outcomes of this project to achieve the desired impact**? Our project will work toward improving the hygiene practices of school-age children and increasing access to hygiene facilities in local schools.

2. What needs to **occur (the outputs)** for us **to achieve the identified project outcomes**? Our project team will determine the current practices of school-age children.

   We and our partners will work to improve hygiene practices by:

- ➔ Raising awareness among teachers and students about the benefits of hand washing and when to do so, such as before eating and after using the toilet
- ➔ Helping people improve their hand washing practices, such as always using soap

And we will work to increase access to hygiene facilities in local schools by:

- ➔ Increasing access to key materials, such as faucets, pipes, or a water source
- ➔ Installing and updating hand washing stations
- ➔ Including ongoing supply needs such as soap in the school budget

You can continue until you've identified a robust logic for how change will happen.

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3. Now, think about **what activities (inputs)** you'll implement to achieve that, such as:
   - ➔ Creating a hand washing curriculum for teachers to implement with students
   - ➔ Training teachers in how to use the curriculum
   - ➔ Designing hand washing awareness posters to place at schools
   - ➔ Setting up hand washing facilities at convenient locations in or near schools, which includes ensuring access to a water source and providing soap
   - ➔ Working with school administrators to maintain the facilities and ensure the project's sustainability by including materials in the school budget
4. Finally, consider **any assumptions** you've made that could affect your project:
   - ➔ Are materials such as soap affordable and easily accessible?
   - ➔ Are teachers and students willing to learn new hygiene practices?
   - ➔ What potential events could disrupt the project, such as worker strikes, time off from school, or natural disasters?

THE IF-THEN-BECAUSE FRAMEWORK

Another way of stating a theory of change is to use an **if-then-because** framework:

If we improve access to hand washing stations and train teachers to use the hand washing curriculums,

Then we will reduce incidences of diarrhea in school-age children and improve their school attendance,

Because students will practice proper hygiene after using the toilet and before eating, thereby removing bacteria.

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PUTTING IT TOGETHER

Here is an illustration of a theory of change for the hygiene project in Cambodia using the building blocks to impact.

INPUT

- Funding for training and key materials.
- Trainers to teach the curriculum.
- Setting up hand washing stations.
- Hygiene campaign material is created.
- School administrators can maintain facilities.

OUTPUT

- Hygiene campaign material is distributed.
- People have access to the materials they need to maintain the hand washing stations.
- Teachers and students have more knowledge about the benefits of hand washing and when it's needed.
- People understand and implement proper hand washing practices, such as using soap.
- Ongoing material needs like soap are included in school budgets.

OUTCOME

- School-age children have improved their hygiene practices.
- Local schools offer more access to hygiene facilities.

IMPACT

- Reducing the prevalence of diarrheal disease among children by a measurable amount.

Assumptions:

Soap is affordable and easily accessible.

Teachers and students are willing to learn.

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As we develop our theory of change, we'll identify our indicators to track the progress being made. We'll select indicators such as:

- Percentage change in school-age children who wash their hands after using the toilet or before eating
- Percentage of trained teachers who demonstrate an understanding of the material
- Percentage of teachers at the school who are trained in proper hand washing techniques
- Percentage of trained teachers who use the hand washing curriculum in their classrooms
- Number of new hand washing facilities that have been established

PUTTING A THEORY OF CHANGE INTO PRACTICE

What is the impact goal of your project?

What are the intended outcomes of your project?

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What has to occur, or what outputs are necessary, to achieve the outcomes?

What activities are necessary to achieve the outcomes?

What inputs (resources and materials) will you need for your activities?

What assumptions are you making about your project, such as your ability to acquire materials and whether teachers are receptive to training?

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What indicators will you use to measure your progress toward your outcomes and goal?

Now, put it all together and sketch your theory of change. Be clear about the inputs and activities that need to take place and what you expect to occur as a result of those activities. Try using the building blocks to impact or the if-then-because framework.

UNDERSTANDING AND CHOOSING INDICATORS

IN THIS CHAPTER, WE'LL FOCUS ON:

- ➔ What indicators are and why they're important
- ➔ The types of indicators you can use
- ➔ How to use indicators effectively

WHAT ARE INDICATORS AND WHY DO THEY MATTER?

Indicators are data points (sometimes numerical, sometimes not) that you can observe, collect, and analyze to provide insights about the progress of a project.

Indicators play a crucial role in measuring and evaluating your project:

- They **provide a way to track your progress** toward the project's outcomes. This offers benchmarks for comparison and enables project teams to assess whether they're on track to make the desired change.
- They **support informed decisions**. By tracking the indicators, the project team and the people affected by the project can identify successes, challenges, and areas in need of improvement.
- They **increase transparency and accountability** by providing clear information about the project's achievements and evidence of its results.
- They **facilitate learning and improvement** by offering insight into what works and what doesn't. The project team members can identify the project's strengths and weaknesses, and then use what they learn to refine their strategies, adjust their methods, and improve future projects.
- They **serve as a shared reference for reporting** the project's progress and results to the groups involved and the people affected by it. They also help you tell the story of your project more clearly.

The indicators you'll use to measure your project's results are aligned with the different elements in the theory of change — input, output, outcome, and impact.

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UNDERSTANDING AND CHOOSING INDICATORS

This chart shows four common types of indicators used in program measurement and lists examples for the hygiene project in Cambodia.

Type of indicator	Input	Output	Outcome	Impact
Definition	Input indicators measure the funding, time, training, or other materials that we invest in a project.	Output indicators measure the immediate results of the activities that have taken place, such as the number of people trained or the amount of materials delivered.	Outcome indicators measure the intermediate results of our actions, such as changes in attitude or behavior in the target population.	Impact indicators measure the long-term change resulting from our actions. These are measurable improvements that wouldn't have occurred otherwise.
Examples	Number of trainers, funding for training, and the campaign materials available	Number of teachers and administrators trained to use the hygiene and behavior change curriculum; number of water, sanitation, and hygiene education materials per student	Number of basic hygiene services (hand washing facilities with water and soap), number of students that have improved access to safely managed sanitation, positive change in students hygiene perspectives and practices	Number of instances of diarrheal disease among children, number of school absences 6 months and 12 months after the end of the project

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WHAT MAKES AN INDICATOR EFFECTIVE?

Using these tips will make your indicators more effective, which means they'll provide more meaningful insights as you track your progress towards your goal.

- **Align your indicators with the project's goals:** Ensure that the indicators you select directly measure the intended outcomes. They should be relevant to the project's purpose.
- **Make indicators specific and measurable:** Clearly define what you'll measure. This will help you collect and analyze data accurately.
- **Ensure that your indicators are achievable and time-bound:** This helps you set realistic targets and track your progress.
- **Concentrate on the most valuable indicators:** Focus on a few indicators that provide meaningful and actionable information.
- **Use both qualitative and quantitative indicators:** Quantitative indicators are important, but don't overlook the value of qualitative data. Consider how you can use qualitative data.
- **Set realistic indicators and targets:** Select practical indicators that you can measure using the project's resources and timeline. Make the targets challenging yet achievable based on the project's scope, resources, and timeline. Unrealistic indicators and targets can undermine people's motivation and hinder accurate assessment of progress.
- **Separate your indicators into smaller and specific categories:** Collect data in ways that allow you to sort it by information such as people's income, gender, age, race, ethnicity, migratory status, disability, and location. Doing this lets you find patterns or inequalities for certain groups that aren't evident in the larger data set.
- **Review and update your indicators:** Regularly assess the relevance and effectiveness of the indicators you chose. Adjust them as needed to align with changes in circumstances or priorities.

Indicators that meet these criteria are valuable tools for measuring your progress, evaluating project success, and making informed decisions.

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MORE CONSIDERATIONS ABOUT INDICATORS

Here are a few other factors to consider when you're selecting indicators. See some additional examples from multiple project types.

How to state it	Data sources	Data frequency
Indicators can be stated as pure counts or as percentages. For percentages, you'll need to use the count of the specific outcome divided by the total count of relevant population.	Identify what sources might have data for your indicator so you know where to obtain it. This can include existing sources or new data sources that you create yourself.	Consider how often you'll collect data. This can be daily, monthly, annually, etc., depending on the need for timely information to track your progress and make decisions.
Examples **Count:** Number of treated bed nets distributed **Percentage:** Proportion of children under age five who slept beneath a treated bed net the previous night	**Examples** **Existing sources:** Government reports, databases, school attendance records, surveys to participants **Sources you create:** Surveys, interviews, or observation forms	**Examples** **Daily:** Vaccine distribution tallies **Monthly:** Reports **Annual:** Surveys **End of project:** Comparing baseline data to endline data

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PUTTING INDICATORS INTO PRACTICE

List some indicators for your project.

RETHINKING A COMMON INDICATOR, "NUMBER OF PEOPLE WHO BENEFITED"

One of the first indicators people might think of is tracking the number of people who benefited from a certain project. But this isn't an ideal indicator — it's not specific, and it doesn't provide information about the intended change resulting from the project.

Without these details, the indicator is vague. There's no distinction between people who benefited directly and those who benefited indirectly.

To ensure that your measurements and reporting are meaningful, refine the indicator with specific information about exactly who the project benefited and the change they experienced.

Here's how to do that:

1. **Define your target population.** Specify who you want to reach, such as low-income women in rural areas or school-age children from a specific district or school.
2. **Include details about specific outcomes from the project.** Measure things like skill proficiency, employment success, or improved health.
3. **Differentiate between people who are affected directly and indirectly.** Clearly separate those who are directly affected by the activities from those who are not.
4. **Collect qualitative data.** Use interviews, focus groups, or open-ended survey questions to gather people's perspectives and detail about their experiences.

UNDERSTANDING AND CHOOSING INDICATORS

USING ESTABLISHED INDICATORS

Rotary is developing a list of indicators that align with the areas of focus that all members can use for their projects. By using these established indicators, you can ensure that your project is consistent with Rotary's objectives and areas of focus. Using existing indicators also lets you benefit from established frameworks and it saves time and resources.

Many fields, such as education, health care, climate change, peacebuilding, and sanitation, have developed indicators specific to their work. You can find more information about these established indicators at the end of this handbook.

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COLLECTING THE DATA YOU NEED

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IN THIS CHAPTER, WE'LL FOCUS ON:

- Considering the scope of your project's measurement needs
- Understanding what type of data you need
- How to get the data that you need to measure your project

WHAT'S THE RIGHT LEVEL OF MEASUREMENT?

Think about the scope of your project when you consider its measurement needs. This helps align your data collection efforts with the project's size and complexity.

For example, a small community project, such as a neighborhood cleanup, may collect data through observation and counting to track the number of volunteers and the amount of time they dedicated to the project (**inputs**), or the amount of litter they collected **(output**). The activities contribute to the **outcome** of having clean, accessible public spaces, which can be documented using before-and-after photos or videos. For this project, the only tools necessary may be a pen, paper, and a smartphone or camera.

In contrast, a large-scale public health project, such as an immunization campaign, may require more sophisticated tools to track the time, money, and vaccines that it contributes (**inputs**). Data about the number of vaccines administered (**output**) may require multiple health facilities to submit their results into an electronic system. The campaign may also need to use surveys and public population data to monitor the vaccination rate in the target area (**outcome**). All these data collection efforts help inform decisions about the project and track its progress toward reducing the prevalence of disease (**impact**).

In general, consider budgeting a portion of your project funding to monitoring and evaluation expenses, such as local travel, services from people or agencies, and supplies.

COLLECTING THE DATA YOU NEED

WHAT DATA DO WE NEED, AND HOW DO WE GET IT?

Depending on the type of project you're doing and the indicators you've chosen, you or a project partner may need to collect data yourself (primary data), or you may be able to use data that already exists (secondary data).

The method you choose will depend on the project's objectives, the type of data you need, and the resources you have available. It's important to carefully plan this to ensure that your methods are appropriate, reliable, and ethical.

DATA IN NUMBERS — AND WORDS

Data comes in two forms, quantitative (**numbers**) and qualitative (**words**):

- **Quantitative data** measures the extent of change. It provides a snapshot of a project's progress and is typically more objective and straightforward to analyze than qualitative data. But it might not capture the complexity of human experiences or provide a complete picture.
- **Qualitative data** offers insight into people's attitudes and behaviors. It is typically more difficult to analyze, but it provides valuable information about people's perspectives. It often explains the effect of a project on people's lives and can help us understand the underlying reasons for the numbers we collect.

In practice, people often use a combination of qualitative and quantitative data to gain a more comprehensive understanding of the project and its outcomes.

DATA SOURCES

Start by thinking about where the data you need will come from:

- **Observation:** Will you or someone on your team be able to collect data by observing what occurs?
- **People:** Will you need to interact with people affected by the project or other community members to get the information?
- **Documents:** Will you be able to find data from documents, such as administrative records, a webpage, or meeting notes?

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DATA COLLECTION METHODS

After you've identified what data you need, think about how to get it.

The Conducting Community Assessments handbook contains tips about using different data collection methods, including detailed descriptions of many of the methods listed below.

Review this table of common ways to collect data and the benefits and limitations of each one.

Collection method	Examples	Benefits	Limitations
Observation	Direct observation, video observation	Provides a detailed record of the project, can capture nonverbal cues	Can be time-consuming, may not capture all aspects of the project
Focus groups	Group discussions, moderated roundtable discussions	Provides insights into group dynamics, can capture diverse perspectives	Can be influenced by dominant personalities in the group, may not be representative of the entire population
Interviews	Structured (with set questions and a planned order), semi-structured (with some planned questions), or unstructured (with no planned questions)	Provides detailed information that offers insights into the community and project, can be customized to sponsors' needs	Can be time-consuming and expensive to conduct, may not be representative of the entire population

COLLECTING THE DATA YOU NEED

Collection method	Examples	Benefits	Limitations
Surveys	Questionnaires, polls, feedback forms	Provides quantitative and qualitative data that can be easily analyzed, can reach a large number of people	May reflect a response bias, may not capture all aspects of the project
Counts	Tally sheets, checklists, traffic counters	Provides quantitative data that can be easily analyzed, can track changes over time	May not capture all aspects of the project, may reflect any bias from the observer
Document and policy review	Grant records or reports, meeting notes, enrollment forms, government policies, webpages	Provides a record of the project, can be used to track progress over time	May not capture all aspects of the project, may not be up to date
Maps	Geographic information systems, satellite imagery, hand-drawn community maps, previous project maps	Provides spatial data that can be used to identify patterns and relationships, can be used for visualization	May require specialized expertise to analyze
Participatory methods	Participatory rural appraisal, community mapping, photovoice, (participatory video)	Engages community members in the data collection process, can record local knowledge and perspectives	May need more time, resources, or facilitators; may not be representative of the entire population

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WHO SHOULD COLLECT THE DATA?

Data collection requires time, resources, and expertise. You might not have all these things within your project team, so you may need partners. Understanding the local context is an important part of data collection, which is why local governments, nongovernmental organizations, universities, and community members themselves often make the best data collectors.

Community participation

Participatory methods are designed to actively engage people in the data collection process. This can promote community involvement, build trust, and generate more accurate and meaningful data. But participatory methods also have ethical considerations such as power dynamics, community representation, data ownership, and confidentiality. Because of this, we recommend working with a partner organization that has experience using participatory methods.

Common types of these data collection methods include:

- **Participatory rural appraisal.** This community-based approach involves residents in the research process. It typically includes focus group discussions, mapping, and ranking exercises, and may be used to gather information on several topics, such as community needs, resources, and development opportunities.
- **Photovoice.** In this approach, participants take photos that represent their experiences and perspectives. They may be asked to photograph their community, their daily lives, or other topics, and then discuss the meaning of the images.
- **Community mapping.** This involves creating maps, diagrams, or other representations of a community to identify important places, resources, social networks, and other key features. It can be used to gather information on issues such as access to health care, education, or transportation.

Consent and data management

Always get written consent from a person to collect their information and be sure that you have implemented measures to keep their data secure. Consent means a person has provided their information or answered questions freely and understands how the information may be used.

DATA QUALITY

During this process, it's important to ensure that you're gathering meaningful and accurate information. If the data you collect doesn't align with your indicator or if you imprecisely count the people affected by the project, the data won't be useful to tell your project's story or improve future projects.

PUTTING DATA COLLECTION INTO PRACTICE

What indicators are you collecting data for?

Does the data you need already exist (secondary data) or will you need to collect it (primary data)?

How will you gather that information (observation, survey, documents)?

What are your data sources? How often will you need to collect data?

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If you're using interviews or surveys, how will you ensure that marginalized members of the community participate fully?

What other methods have you considered?

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USING DATA TO TELL STORIES

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IN THIS CHAPTER, WE'LL FOCUS ON:

- Using the data you collect to tell your project's story
- Sharing that story in a compelling and meaningful way

WHY IS IT IMPORTANT TO TELL YOUR STORY?

Rotary's reputation as an organization that makes lasting change is reinforced by all the members who contribute to our global impact. The data you collect demonstrates your project's effect to:

- Community members
- Donor organizations
- Partner organizations
- Prospective members
- The public
- Rotary members

The measurements you collected allow you to tell a compelling story of how your club or district contributed to positive change. Sharing these stories can attract like-minded leaders to your club, lead to new partnerships, and build a stronger and more diverse network of people who you can collaborate with on bigger projects.

Defining and measuring the effect you have on your community is an important part of your club's or district's legacy. You can use this data to choose projects that offer the most value to your community and to improve those projects to have a greater impact in the long term.

SHARING RESULTS

Project reports show not only that funds are being used properly, but also that we change communities for the better. Reporting on your project is an important way to share your progress, your activities, your challenges, and your successes.

It's a good idea to report on the outcomes for any project your club or district completes. If your project used Rotary Foundation district or global grants, you need to file reports that contain specific information. But for all reports, it's important to include:

- The progress toward your main objectives
- Activities in your project that are complete or underway
- Your data collection methods and up-to-date figures for key indicators
- Any challenges you've encountered in achieving the project outputs and outcomes
- Details about your project expenditures

MORE WAYS TO SHARE YOUR RESULTS

Sharing your results beyond the required reports allows you to tell your project's story to more people. First, think about what audience you're trying to reach and what information they need to know. Some channels to consider include:

- Rotary magazine
- Regional magazines
- District or club newsletters
- Blogs such as Rotary Voices and Rotary Service in Action
- Social media
- Local news media
- Service Project Center
- Events where you connect with prospective donors or partners

Rotary's Brand Center has guidance about crafting your story to show that our members are people of action. It also has templates to help you share your story with different audiences.

Remember Rotary's privacy policy

Be sure to consider data privacy and what information is appropriate to share, either with or without permission. For example, you need permission from everyone in a photograph before it can be shared. Learn more about Rotary's privacy policy.

BEYOND THE PROJECT

Maintain your relationships with the people involved in and affected by the project, such as community members and partner organizations, after the project is implemented.

One reason is because you'll want to keep collecting data. Although you can assess outputs after a project is implemented, the outcomes and impact often need more time to materialize. Continuing to collect data will let you fully evaluate the results and see the project's impact.

Equally important is building long-term relationships and trust with the groups involved in the project and the community. By staying actively involved, you'll be able to communicate the results of the project and share insights from your measurement efforts. This approach not only makes the project more sustainable but also facilitates better planning for future collaborations.

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MAKING YOUR STORY EASY TO UNDERSTAND

Consider how to present your data other than as narrative text or columns of numbers. Other options can emphasize the main points of your story.

Photos and video clips can convey a story in ways that text and numbers cannot. Remember to add subtitles for accessibility or if your audience speaks a different language from people in the video. Insert graphics occasionally to highlight an aspect of your data that may not otherwise be obvious.

Infographics are a succinct and compelling way to display your project results and can include quantitative and qualitative data as well as photos. Many free online tools are easy to use, so find one that has the functions you want and has terms and conditions that are acceptable to you. You can find links at the end of this handbook.

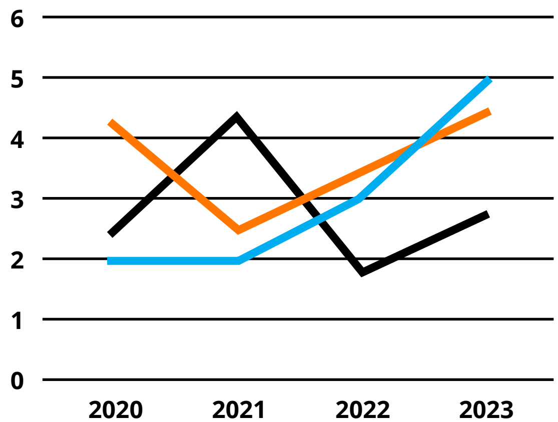
DATA VISUALIZATION TIPS

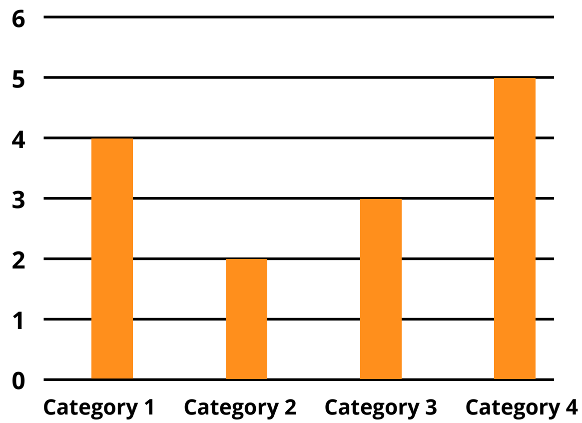
Line charts

- **DO** use line charts to show trends over time.
- **DON'T** use line charts to compare values across categories.

Bar charts

- **DO** use bar charts to compare values across categories.
- **DON'T** use bar charts to show trends over time.





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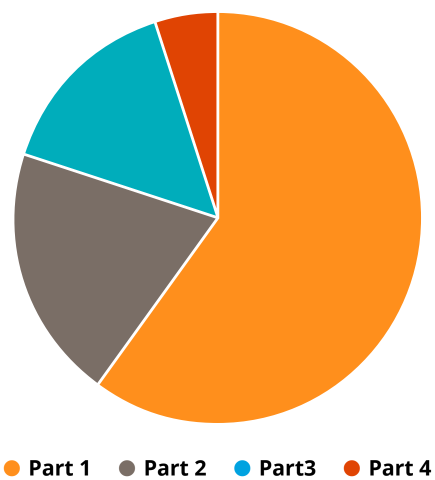
USING DATA TO TELL STORIES

Pie charts

- **DO** use pie charts to show parts of a whole.
- **DON'T** use pie charts if the number of categories will make it difficult to read.

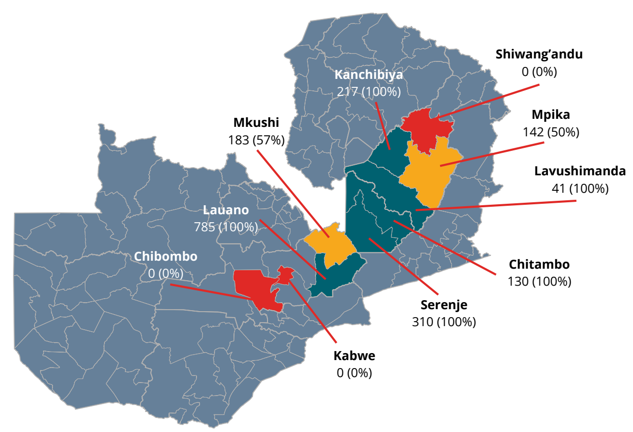


Maps

- **DO** use maps to show geographic data, with insets to show details.
- **DON'T** use maps if geographic factors aren't relevant.

COMMUNITY HEALTH WORKERS SATURATION (1 PER 500 PEOPLE)

Number of trained CHWs in districts supported by the program since its April 2021 launch



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MEASURING TO SHOW OUR IMPACT

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IN THIS CHAPTER, WE'LL FOCUS ON:

➔ Why measurement matters to Rotary

HOW DOES MEASUREMENT HELP US SHOW OUR IMPACT?

Rotary's history of creating positive change around the world motivates us to make an even greater difference in the future. To do this, we need to be able to measure our impact.

Having clear and concrete proof of our achievements is crucial to engaging innovative and dynamic collaborators in our mission. This evidence of our impact not only attracts partners, younger people, participants, and donors, but also builds trust with the communities we work with.

It takes some effort to build the skills to measure and monitor a project, implement measuring in your activities, and share the results. But it's a process we're in together, and we can help each other, talk about our experiences, and gain knowledge to increase our impact and create lasting change.

Rotary's essence has always been the relationships we have with each other and our communities. Together, we can show how people of action transform the world.

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ROTARY RESOURCES

Project planning and measurement

- Connect with local experts to help plan your project.
- Use Rotary's array of project planning resources to help you answer questions and solve problems at various stages in the process.
- Review the Conducting Community Assessments handbook to find out what methods might work best for the community you're working with.
- Take the Measurement and Reporting Our Impact course in Rotary's Learning Center.
- Take the three courses in the Increase Your Impact learning plan in the Learning Center.
- Review the Positive Peace Project Design Tool to help you design your project using the pillars of positive peace framework.
- Review the Rotary and USAID partnership results.

For more information, review the Developing Effective Projects page of My Rotary.

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Rotary grants

- [Rotary's Programs of Scale Grant Competition Handbook] provides details about the eligibility criteria and the application and selection process.
- The Terms and Conditions for Rotary Foundation District Grants provides a detailed explanation of district grant eligibility and procedures.
- A Guide to Global Grants helps members who want to apply for a global grant or develop more effective and sustainable service projects.
- The Terms and Conditions for Rotary Foundation Global Grants provides a detailed explanation of global grant eligibility and procedures.
- The Areas of Focus Policy Statements explain the eligibility criteria for global grants in each area of focus.
- The guidelines for each area of focus provide detailed information about eligibility by project type:
  - Peacebuilding and Conflict Prevention Guidelines for Global Grant Funding
  - Disease Prevention and Treatment Guidelines for Global Grant Funding
  - Water, Sanitation, and Hygiene Guidelines for Global Grant Funding
  - Maternal and Child Health Guidelines for Global Grant Funding
  - Basic Education and Literacy Guidelines for Global Grant Funding
  - Community Economic Development Guidelines for Global Grant Funding
  - Environment Guidelines for Global Grant Funding

For more information about Rotary grants, review the Apply for Grants page of My Rotary.

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EXTERNAL RESOURCES

Measurement and evaluation

- Introduction to Program Evaluation for Public Health Programs: A Self-Study Guide: This manual advises about planning and implementing evaluation activities based on a framework from the U.S. Centers for Disease Control and Prevention.
- Rapid Guide to Designing SMART Indicators: Created by the website IndiKit, this guide offers details about creating indicators that follow the SMART framework. IndiKit also offers hundreds of indicators, organized for projects in different sectors.
- Data for Impact: This site, supported by USAID, includes indicators, frameworks, and guides on how to implement measurement and evaluation activities, especially if you want to work with nongovernmental organizations and governments.

Data visualization

- Canva: Web-based software to help you create professional-style presentations, graphics, and more that you can share with others.
- Information is Beautiful: A collection of data visualizations you can peruse for ideas.
- Qualitative Chart Chooser: Resources and examples of how to present qualitative data.
- The Data Visualisation Catalogue: Examples and descriptions of dozens of ways to display data.

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