The Youth Advice Outcomes Toolkit

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youth ACCESS
to information, advice and counselling

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Working Together for Advice

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Introduction

The purpose of the *Toolkit*

Despite the fact that around a million young people each year choose to access a youth advice service, it has never been more important for those services to have good evidence of their effectiveness.

However, the importance of having good evidence goes well beyond the current policy and funding context, in which any service that cannot prove its value is likely to be vulnerable to cuts. It is essential for agencies themselves to understand the impact that their services are, or are not, having on young people's lives.

The Y*outh Advice Outcomes Toolkit* has been designed specifically for youth advice services providing advice on rights-based issues (e.g. housing, homelessness, welfare benefits, debt and employment rights) as part of a wider holistic service for young people and for 'mainstream' advice services (e.g. CABx and Law Centres) providing advice targeted at young people. It may also have some applicability to other front-line one-to-one support services for young people – initial testing would be advisable.

The *Toolkit*'s primary focus is on 'soft' outcomes (see 'What are outcomes?' overleaf) and it was particularly designed to provide evidence of the contribution of advice to the five Every Child Matters outcomes.

An independent evaluation[1] of pilots of the *Youth Advice Outcomes Toolkit* found it to be:

- easy to implement;
- appropriate to youth advice services;
- adaptable and flexible to the circumstances of individual agencies;
- capable of evidencing outcomes relevant to Every Child Matters and Integrated Youth Support Services;
- effective at enabling agencies to meet both funders' needs for outcomes data and agencies' internal needs for management information.

The purpose of the *Guidance*

Youth Access' experiences in testing the *Youth Advice Outcomes Toolkit* have taught us that monitoring the outcomes of youth advice services is not straightforward – even with a toolkit that has been designed specifically for the youth advice sector.

The *Guidance* has been written to assist managers and other workers in youth advice agencies to decide how best to design and undertake a youth advice outcomes monitoring exercise in their agency using the *Youth Advice Outcomes Toolkit.*

1 *Youth Advice Outcomes Pilot*, Evaluation Trust for Youth Access, 2010.

Using the *Guidance*

The core of the *Guidance* comprises seven steps that we believe need to be followed in order to ensure a successful outcomes monitoring exercise. These are:

Step 1 **Clarify what you're seeking to achieve**

Step 2 **Identify your resources**

Step 3 **Tailor the *Toolkit* forms to suit your agency**

Step 4 **Design your methodology**

Step 5 **Prepare for your monitoring exercise**

Step 6 **Undertake your monitoring**

Step 7 **Analyse and present your data**

It is highly recommended that you do not skip any of the steps, as it could lead to an ineffective piece of work and a waste of your precious resources.

Although the seven steps need to be followed in order, it is important that whoever is responsible for planning and managing your monitoring exercise reads the *Guidance* in full before proceeding.

How the *Toolkit* was developed

The *Youth Advice Outcomes Toolkit* has been developed by Youth Access over a number of years. In 2005, Youth Access initiated work on monitoring the outcomes of youth advice work as part of our Rights to Access Project (RAP). The process included a national consultation with agencies, local consultation by agencies with staff and users and a pilot phase.

The initial version of the *Toolkit*, tested in 2006 by three youth advice agencies, involved a two stage self-assessment process: the first being a self-assessment by the user at the outset of the advice process, with a second self-assessment form being completed by the user after three months or at the closure of the advice process, whichever was earlier. This methodology was chosen for its robustness, but, when trialled with three youth advice agencies, resulted in disproportionately small quantities of data for the resources expended in collecting it. The results from this work are outlined in the independent evaluation of RAP.[2]

As part of the Advice Outcomes workstream of the Working Together for Advice project, Youth Access consulted extensively with its members to inform the further development of the *Toolkit*. This involved an online consultation with youth advice agencies, focus groups with young people and discussions with key external partners.

2 *Transforming Lives: Evaluation of the Rights to Access Project: A research report for Youth Access*, Michael Bell Associates Research and Consultancy, 2007.

Following the consultation, Youth Access revised the *Toolkit* and recruited ten youth advice agencies to participate in pilots of a simpler single stage process. The pilots commenced in January 2009 and ended in September 2009, producing data from over 500 young people.

A thorough independent evaluation of the pilots was conducted, resulting in an evaluation report,[3] which provided data analysis, concluded that the *Toolkit* was fit for purpose and made recommendations for further refinement.

Youth Access has since made revisions, resulting in the current version of the *Youth Advice Outcomes Toolkit*. The *Toolkit* is now ready to be rolled out to the wider youth advice sector.

Permission to use the *Toolkit*

Agencies that are members of Youth Access are granted automatic permission to use the *Youth Advice Outcomes Toolkit* for as long as they remain in membership.

All other agencies are required to seek Youth Access' permission before using the *Toolkit*. Youth Access reserves the right to charge a fee for use of the *Toolkit*.

We request that all agencies using the *Toolkit* provide Youth Access with feedback, so that we may refine it in the future, and send us the results of their outcomes monitoring, so that we may continue to develop the evidence base for youth advice work.

3 *Youth Advice Outcomes Pilot*, Evaluation Trust for Youth Access, 2010.

What are 'outcomes'?

There is often considerable confusion amongst advice agency staff regarding the terminology relating to outcomes monitoring. Youth Access has based its work on outcomes around these simple definitions devised by Advice Services Alliance:

- **Inputs** are the resources that contribute to the work of the agency, e.g. staff, premises, equipment
- **Outputs** are the services that the agency delivers, e.g. advice sessions, information leaflets, casework, advocacy and representation, social policy work, community education
- **Outcomes** are the changes that the agency achieves as a result of its outputs/services[4]

There are several distinct categories of outcomes that are relevant to youth advice work:

Type of outcome	*Examples*	*How assessed?*
Hard outcomes (also referred to as 'Advice outcomes' or 'Case outcomes' or 'Quantitative outcomes' or 'Practical gains')	• Secured client welfare benefits • Got client re-housed	Adviser assessment
Soft outcomes (also referred to as 'Client outcomes' or 'Personal outcomes' or 'Qualitative outcomes' or 'Consequential gains')	• Client feels less stressed • Client has improved confidence • Client has better family and personal relationships • Client is better engaged in education or employment	User self-assessment
Policy outcomes	• Change to local authority housing allocations policy • Improved administration of Housing Benefit	Agency assessment
Community outcomes	• Reduction in numbers of NEETs in locality • Lower teenage pregnancy rates	Large-scale (often Government) research or audit

4 This definition of 'outcomes' slightly modifies the definition contained in *A Practical Guide to Outcomes for Advice*, Advice Services Alliance, 2005.

The *Youth Advice Outcomes Toolkit* focuses primarily on monitoring the soft outcomes of youth advice work, although it can also be used to capture certain hard outcomes.

Soft outcomes can be broken down[5] into:

- **Personal gains** – confidence, self esteem and peace of mind; capacity to cope and take action.
- **Healthy living gains** – improved physical, mental and sexual health; sleep and relaxation; food, shelter and heat.
- **Quality of life gains** – improved independence and security; better family and personal relationships; active in the workplace or community.

5 Taken from *Notes of a brief enquiry into 'Outcomes' work being done in the Advice and Voluntary Sector*, Age Concern England and Benson-Waterhouse, 2005.

Seven steps to a successful outcomes monitoring exercise

STEP 1 Clarify what you're seeking to achieve

What is the purpose of your exercise?

It is essential that you determine the precise purpose of your outcomes monitoring exercise before making decisions about its design.

There are a variety of reasons why youth advice agencies become interested in collecting evidence of the outcomes of their work. The most common driving force for many agencies is to satisfy funders' requirements or to attract new funding. However, this should not be your principal motivation. There can be considerable wider benefits to the agency from undertaking an outcomes monitoring exercise:

- Seeing evidence of good results can motivate staff and improve team morale
- The exercise can help you to gain a deeper understanding of the impact your service is making on your clients' lives and help drive a young person-centred approach
- It can help your clients to review what's changed for them
- It can improve your agency's accountability – to your clients, funders, trustees and other stakeholders – and help you build the agency's reputation
- It can help you identify aspects of your service that are effective and areas for development, or even the need for new services
- Your evidence can be used to improve the accessibility of your service, by demonstrating your effectiveness to potential users and referrers.

How robust does your data need to be?

Many of your decisions relating to issues raised in *Step 4: Design your methodology* will depend on how academically robust you want your results to be. Agencies needing to produce data for health sector funders, for example, may require relatively robust evidence.

However, you will need to bear in mind the resources you have available for the work. Many agencies start out wanting to use very robust methods, but find they do not actually have the resources required, leading to some degree of trade-off between resources and robustness. (See *Step 2: Identify your resources* for further information about resource considerations.)

Arguably, whatever outcomes research a local youth advice agency does is likely to have some methodological flaws in it – indeed, this is often the case even for many well-resourced pieces of academic research. Rather than aiming for perfection, we recommend that you employ a methodology that is realistic bearing in mind your staff capacity, your users and your resources. Provided that your chosen methodology is applied consistently within your agency and is fully explained when you present your results, your data should have credibility.

Is the *Youth Advice Outcomes Toolkit* right for you?

The *Youth Advice Outcomes Toolkit* uses a 'retrospective pre-post' methodology in which a single assessment is conducted, some time after the delivery of the service. The user is asked to remember back to how they were before the service started and to rate the changes that have taken place. There is general consensus in the advice sector that this methodology is the one that's most suitable for monitoring the outcomes of advice work.

However, retrospective pre-post methodologies tend to be viewed by social scientists and academics as less rigorous than 'pre-post' methodologies, in which change is measured by comparing a baseline assessment taken before or at the start of the service with a second assessment conducted after the delivery of the service. This two-stage approach theoretically provides greater certainty that changes recorded have actually taken place, although it can still be difficult to attribute changes directly to the service provided.

The key advantage of taking a single stage approach is that only one assessment is needed, thus reducing the burden to the user and the cost to the agency. Two-stage approaches, on the other hand, are considerably more complicated and are subject to 'attrition', i.e. losing clients in the sample due to the difficulty of following up every client for whom an initial assessment has been made, tending to result in a lot of redundant initial assessments which effectively waste both the user's and the agency's time. This problem is particularly acute for agencies working with young people leading chaotic lives.

In short, we believe that using the *Youth Advice Outcomes Toolkit* is likely to prove the most practical solution for most youth advice agencies and can produce relatively large quantities of data – thus improving the reliability of findings – without expending huge resources.

However, if your answer to the question 'How robust does your data need to be?' was that you require very robust data, then you may wish to find a validated pre-post outcomes tool that is suitable for use with young people instead of using the *Youth Advice Outcomes Toolkit*. Youth Access can advise you about relevant tools. (NB: We are currently exploring validation routes for the *Youth Advice Outcomes Toolkit*, although none exists currently in the advice sector.)

Are you seeking quantitative or qualitative data?

There are two broad approaches to research: quantitative and qualitative. Which approach you take depends on the questions you wish to ask and the type of evidence you want to end up with. Neither approach is 'better', but one may be more appropriate to the task in hand and each requires a different type of study design.

If you want to end up with quantitative data, such as statistical evidence, then you may need to employ a survey with a limited range of tick box answers.

Qualitative data tends to be more narrative. Methods of collection can include interviews, focus groups, observational studies, open response surveys aimed at eliciting high quality information.

Many studies take a combined quantitative and qualitative approach, e.g. by use of questionnaires with a mix of tick boxes (to obtain quantitative data) and open response boxes (to elicit qualitative data).

The core of the *Youth Advice Outcomes Toolkit* – the basic *Have we Helped?* form – is designed to produce quantitative data, but there are optional additional qualitative questions that can be added for those wanting to take a combined approach.

STEP 2 Identify your resources

How you undertake your outcomes monitoring exercise will need to be driven, to a large extent, by the resources you have available.

It is easy to under-estimate the resources that will be required to undertake a successful youth advice outcomes monitoring exercise.

The evaluation of Youth Access' *Youth Advice Outcomes Toolkit* pilots found that an average interview with a client to complete a *Have we Helped?* form took around 15 minutes. Thus, to achieve a sample of 50 completed forms would require almost 13 hours of staff time. However, this does not include the time taken to: set up the project; recruit volunteers; train staff; identify clients; arrange interview times; collate and analyse data; present and communicate results. Citizens Advice has reported that it requires an average of 14 full days of staff time for the average CAB to obtain 50 responses to its outcomes surveys.

This is not to say that it isn't worth investing resources in outcomes monitoring. Our independent evaluation concluded that: 'It is for the individual organisation to balance the commitment against the benefits. The fact that all the pilot agencies bar one said that they would continue to use the *Toolkit* suggests that its benefits may outweigh concerns about resources'.

The main resource required for an outcomes monitoring exercise is staff time – of managers, advisers and administrators – so you need to carefully consider internal staff capacity and whether it might be worthwhile to use or recruit volunteers to help with the work.

You also need to consider whether your agency possesses relevant skills, e.g. to analyse the data you collate.

Finally, you should consider whether you have any funds you could allocate into a dedicated budget to undertake the work. In writing the *Guidance*, we have assumed that most agencies will have only a minimal budget for their outcomes exercise, but if that is not the case, you could consider, for example:

- employing an independent researcher;
- providing incentives to clients to participate;
- putting money aside for publishing and disseminating a report of your findings at the end of the project.

Considering resources at the outset should help guide your thinking as you go through the other steps in the *Guidance*.

STEP 3 Tailor the *Toolkit* forms to suit your agency

NB: All of the forms that comprise the *Toolkit* can be found at the back of this document.

Tailoring the *Have we helped?* form

The *Have we helped?* form (see p. 26) – which is for clients to self-assess what has changed for them as a result of getting advice – may be adapted to meet your specific needs.

We do not recommend changing the wording of the existing descriptors (e.g. ‘My levels of stress have …’), as they have been developed through extensive testing with advisers and young people. However, where a descriptor is not relevant to your own service, you may wish to replace it with one that is more likely to give you data that you can use.

We do not recommend increasing the number of descriptors overall.

We have provided some suggested *Optional additional survey questions* (see p. 27) that you may wish to consider adding onto the basic *Have we helped?* form. We recommend keeping the form as simple as possible, however, so suggest that you keep the number of any additional questions to a minimum.

Research management information

There is a range of management information that you may wish to collect through adding a box headed ‘This section is to be completed by agency’ onto the bottom of the basic version of the *Have we helped?* form.

What you will need to record here will depend on your overall methodology and how you intend to analyse your survey forms.

Options include:

- **Client reference** – this is essential if you wish to link forms relating to the same clients together for your analysis (e.g. where you are using both the *Have we Helped?* form and the *Adviser* form).
- **Date completed** – this is probably useful anyway, but will be particularly important if you intend to conduct a two-stage process.

- **Name of adviser** – this may be useful if you want to check that forms are being completed by all relevant staff, if you want to compare the outcomes being achieved by different advisers or if you want to use the monitoring process to inform supervision.
- **Completed with assistance?** – this will be useful if you are using a variety of methods and want to separate out for analysis the forms completed by young people on their own from those completed with help from advisers.
- **Face-to-face or by telephone?** – as above, this may be helpful if you are using a variety of methods to follow up clients.

This is an example of how this section of the *Have we helped?* form might look:

> This section is to be completed by agency. Young people will remain anonymous, but we need this to help with analysis
>
> Client reference ______________________
>
> Date completed ______________________
>
> Name of adviser ______________________
>
> Completed with assistance? ______________________
>
> Face to face or tel? ______________________

Tailoring the *Adviser* form

The *Adviser* form (see p. 30) is entirely optional. Whilst it will enable you to cross-reference young people's self-assessed personal outcomes gathered through the *Have we helped?* form with factual information on user profile, help given and hard outcomes, we do not recommend its use unless you are intending to collect data on at least 50–100 clients, as it is unlikely that a smaller quantity of data would make such analysis worthwhile.

The fields and categories contained on the optional *Adviser* form – which may be used by agencies wanting to cross-reference information on user profile, help given and hard outcomes with young people's self-assessed soft/personal outcomes – can all be tailored to meet your specific needs. Thus, you may amend, delete or add any fields or categories to fit with your existing systems and reporting requirements.

STEP 4 Design your methodology

How large a sample of clients do you need?

For most advice agencies, the resources available for monitoring outcomes will make it difficult to survey sufficient numbers of clients to demonstrate that the results are representative of your work overall or to satisfy academic tests of statistical significance.

As a general rule of thumb, it is recommended that you aim for obtaining evidence from a minimum of 50 clients or 5% of your clients, whichever is greater. For agencies wanting some 'quick and dirty' evidence, however, data from just 15–20 clients might suffice, whilst other agencies might want a larger sample to demonstrate the robustness of their evidence. A smaller sample may also suffice for an agency that is primarily seeking qualitative data.

Bear in mind that to achieve your target number, a larger number of clients will need to be approached. Response rates will vary according to your chosen methods for sampling and contacting clients (see below) and the nature of the relationship you have with your clients, so it is hard to provide guidance on the numbers of clients that need to be contacted.

How will you select your sample?

There are almost limitless options, but these are some of the most common approaches to sample selection:

- All clients within a particular period[6]
- Clients selected at random, e.g. every 10th client
- Just casework or drop-in clients
- Client enquiries relating to specific issues, e.g. housing only
- Particular types of clients, e.g. just 16–19 year olds or those clients of a particular service

You may wish to ensure that you achieve a sample that is demographically representative of your client group, e.g. in terms of age, gender and ethnicity.

It is worth noting that you are likely to get a higher response rate – and better-looking outcomes – from clients with whom you have had a greater amount of contact. Thus, if you have limited resources for your exercise, you might want to focus on clients with whom you've undertaken in-depth casework rather than those to whom you've only given one-off advice.

In order to facilitate the process of determining your methodology, Youth Access may be able to offer in-house training on 'Using the *Youth Advice Outcomes Toolkit* in your agency'[7] – contact us to check availability.

How long do you want to measure outcomes for?

The duration of your exercise should reflect the size of sample you want, the numbers of young people coming through your doors and your methods of selecting your sample.

You may wish to carry on with your survey until you have achieved your sample target. Alternatively, you could determine a start and end date for a 'snapshot' exercise, e.g. April to June, or 'blitz it', e.g. by following up already-identified clients over just a few days.

Some agencies feel it would be useful to integrate outcomes monitoring within their overall day-to-day data collection systems. The nature of exercises seeking to monitor soft client outcomes makes this tricky, although it may be possible to integrate hard outcomes monitoring in this way. Another

6 Please note that it can be inappropriate to involve clients who are in distress, so surveying 'all' clients may be unrealistic.

7 For further details, go to http://www.youthaccess.org.uk/events/Using-the-Youth-Advice-Outcomes-Toolkit-in-your-Agency.cfm or email james@youthaccess.org.uk

option is to try to integrate outcomes monitoring with your client satisfaction surveys.

For most agencies, however, we recommend restricting outcomes monitoring to a discrete time-limited exercise rather than doing it on a continuous basis. If you have got your methodology right, the results from a discrete exercise can be just as valid as those from a more onerous continuous process.

Will you offer clients incentives?

In research projects involving young people, it is common practice to offer incentives, such as cash or vouchers, to secure participation, although this was not found to be necessary by the youth advice agencies taking part in testing the *Youth Advice Outcomes Toolkit*.

Great care must be taken to ensure the appropriateness of incentives. Where you are seeking the participation of 'children' aged under 16, straight cash is unlikely to be appropriate and you should inform parents or carers of the nature and value of incentives.

How will you contact your clients?

Testing of the *Youth Advice Outcomes Toolkit* has found that it is usually preferable for the advice agency to go through the self-assessment *Have we helped?* form with clients rather than leaving them alone to complete the form.

There are some advantages to completing the forms with clients in person, e.g. they can actually see the form and it is easier to explain the process. It may be possible to use a face to face method with ongoing clients who you are fairly confident will be coming back into the office for further support anyway. However, if you decide it makes most sense to follow up clients some time after the provision of advice (see *At what point should you follow up clients?* on p. 17), you may feel it would be inappropriate to call clients into the office specifically to complete a form for you.

Conducting your survey over the telephone may have the benefit of not getting in the way of your one-to-one work with clients and may be most suitable for agencies who have already selected their client sample and want to conduct the exercise in a 'blitz'. Problems with telephone surveys can include: difficulties tracking clients down if they've moved house or changed their number; clients being unavailable during the day; and confidentiality, e.g. where you try to contact a client on a landline shared by family. Going through the survey on the phone can also feel somewhat repetitive for the young person.

Many of the agencies that piloted the *Toolkit* ended up employing a combination of phone and face to face methods, often for practical reasons.

Posting forms out to young people is, in theory, one of the cheapest methods of surveying clients, but is likely to elicit a very poor response. It might be more worthwhile to test out surveying clients online, e.g. by emailing either a modified version of the *Have we helped?* form or a link to an electronic survey. Postal and online surveys share a number of disadvantages, however, e.g. not allowing for clarification of questions or answers where required and difficulties ensuring respondents are representative of your whole clientele.

Where clients are left to complete the forms unassisted (whether in the advice agency, by post or by email), written guidance is likely to be necessary. You might wish to consider involving young people in writing the guidance.

Who will contact clients?

Your options here may be limited by your resources, but should also be influenced by the degree of independence you wish to bring to the exercise.

If possible, it is usually preferable for someone other than the adviser(s) to follow up clients. This could involve other members of staff employed by the agency, although agencies piloting the *Toolkit* had considerable success using young volunteers, including law students and social work placements. It is vital to invest adequate time in inducting and training whoever will be undertaking the exercise.

For some agencies, there may be little option other than for the adviser(s) themselves to conduct the surveys with their clients. This could have some benefits, e.g. they may already have built up a rapport with the client that facilitates completion of the survey. However, it may be less likely that the young person will be completely honest in their answers. It will also require diverting precious adviser time to the task.

At what point should you follow up clients?

Outcomes from your advice work cannot be identified at the time the initial advice is given. It is necessary to follow up clients at a later point in order to allow time for the advice to have had an impact. However, if you leave it too long, you may have greater problems tracking your clients down, they may have forgotten how they felt before they got advice and they may not so easily be able to attribute changes to your advice.

Precisely when you should contact clients will depend on how your agency operates, e.g. whether or not you conduct long-term casework and how you manage your cases. If you're wanting to monitor the outcomes from casework, it will often make sense to follow up clients at a fixed point, e.g. three months into the case or at the end of the case. For agencies that are following up drop-in or one-off clients, leaving a period of about two to three months after the advice was given is generally appropriate. However, outcomes monitoring is not an exact science and you may need to employ some flexibility in order to survey sufficient clients.

It may be helpful to write down your chosen methodology simply, as in the following example, so that you and others can be clear about it:

Methodology
for our youth advice outcomes monitoring exercise

- Our outcomes monitoring exercise will start on 1st April
- We will aim for a sample size of 50 young people aged 16–25
- Our outcomes monitoring exercise will end on 30th September or when we have surveyed 50 clients, whichever happens first
- Our sample will comprise all clients with whom we have conducted casework on rights-based issues and whose cases are closed after 1st February
- We will contact clients two months after the closure of their case
- We will contact clients by telephone
- Clients will be contacted by a volunteer who has had no involvement in the young person's case

STEP 5 Prepare for your monitoring exercise

Do you need to get permission of clients?

You may feel it would be preferable, ethically, to have the express permission of clients for you to contact them for the purposes of outcomes monitoring. There is no hard and fast rule about this, so you will need to take your own view. If you do feel prior consent is necessary, you will need to build the gaining of consent into your direct work with young people some way in advance of your monitoring exercise.

In certain situations, consent of a parent or responsible adult (acting in loco parentis) must be obtained before interviewing a child under 16. Ethics and good practice guidelines for research with young people are complex – please refer to detailed guidance on this.[8]

If you remain concerned about the ethics of surveying children, one option would be to focus your outcomes monitoring on young adults aged 16 and over.

When contacting clients to conduct your survey, it is vital to ensure that young people do not feel pressure to participate and that consent to participate is informed and freely given. This requires providing clients with sufficient information about why you want to survey them and what you will do with the information you collect. You may also need to reassure clients that they are not under any obligation to respond to questions in a specific way and that declining to participate will not affect the service they can receive from your agency in the future.

8 See, for example: *Conducting research with children and young people*, MRS, 2006; or *Children and participation: research, monitoring and evaluation with children and young people*, Save the Children, 2001. Youth Access has also developed a course with Independent Academic Research Studies entitled 'Conducting research with young people – getting the evidence you need'. Email advice@youthaccess.org.uk for further information.

How will you ensure your staff team uses the *Toolkit* as intended?

We recommend nominating a lead person within your agency to take responsibility for co-ordinating your outcomes monitoring exercise. It can help for that person to have some authority over the staff expected to do the leg-work.

Consulting with staff and users in advance will help to ensure the success of the exercise.

At the point of implementation, a training and induction session for relevant staff in how to use the *Toolkit* will greatly improve consistency in its application and is highly recommended. Youth Access may be able to facilitate this process.

Will you test-run your methods?

As every agency is different, we recommend spending some time testing your chosen methods of using the *Toolkit* in your agency before embarking on a major data gathering exercise.

Do you need to prepare a plan?

It might prove helpful to prepare a simple plan for your outcomes monitoring exercise before you start, as in this example:

Activity	*Who?*	*When?*	*Resources required*
Design of methods and forms			
Training for staff			
Test methods and forms			
Finalise methods and forms			
Identify clients for sample			
Contact clients/complete forms			
Chase staff/collate forms			
Review progress			
Design of spreadsheet			
Data inputting			
Data analysis			
Report writing			
Dissemination of report			

STEP 6 Undertake your monitoring

The shape of your outcomes monitoring exercise will be determined by your decisions in response to the questions posed in earlier steps.

If you have prepared thoroughly, your actual fieldwork has a good chance of going smoothly!

However, if you are relying on advisers to identify and/or contact clients, remember that they are likely to be busy and may find it difficult to prioritise outcomes monitoring alongside their direct work with clients. You are likely, therefore, to need someone to chase up advisers at regular intervals and check they are following instructions. It may often make sense for this person to be the same person with responsibility for collating the forms, although it can be helpful for them to have some authority over the people they are chasing.

As forms are collated centrally, it is helpful if the person with responsibility for data analysis can make regular checks to ensure consistency in how forms are being completed. Where problems are identified on specific forms, it may be necessary to seek clarification from the individual member of staff/volunteer involved to avoid having to reject the form. Where a particular problem recurs across the team, further guidance or training may need to be given.

If your monitoring exercise is due to take place over a number of months, it is sensible to plan in regular reviews.

NB: Guidance on how to complete the forms is contained with the *Forms* (pp. 24ff).

STEP 7 Analyse and present your data

One of the most common mistakes agencies make when conducting any kind of research is to collect large amounts of data with no clear plan for how it will be analysed, who will analyse it or how the results will be used. Analysis, presentation and dissemination of your evidence ideally need to be considered at the planning stage so that adequate time and resources can be allocated.

If you are planning a relatively small-scale exercise, you may be able to analyse the data you gather relatively easily by hand.

If you are gathering a larger quantity of data, you are likely to require a data analysis tool of some sort. A simple Excel spreadsheet proved adequate when the *Youth Advice Outcomes Toolkit* was piloted and is relatively simple to set up and use.

Effective analysis will also require someone to draw out the key messages from all the information you have gathered and make recommendations about future service development.

You may find it useful to benchmark your data against the evidence[9] from

9 See *Youth Advice Outcomes Pilot*, Evaluation Trust for Youth Access, 2010, or *The outcomes and impact of youth advice*, Youth Access, 2010 (forthcoming).

Youth Access' pilots of the *Youth Advice Outcomes Toolkit*, which involved ten agencies and surveyed over 500 young people. Direct comparisons are difficult to make, however, as every agency will be unique in terms of the precise nature of its advice work and its clients, as well as the precise methodology it employs for its outcomes monitoring exercise.

A written report of your findings is likely to be necessary if you intend to present them externally, although verbal presentations, articles and use of the media are also worth considering.

It is important to establish at the outset at whom any written report will be aimed and what you hope it will achieve. Written reports should:[10]

- be short;
- avoid unbroken slabs of text;
- use tables and graphs;
- use bullet points;
- be judgemental; and
- state conclusions clearly.

To give your findings credibility, it is essential to set out details of your survey methodology in as much detail as possible in any report or presentation. As a minimum, we recommend providing a copy of the questionnaire along with details of:

- start and finishing dates of the monitoring;
- the number of clients involved;
- how representative your sample is of all your clients;
- how they were selected;
- who did the interviewing; and
- whether any incentive was offered to clients.

10 Taken from *Think Research*, Social Exclusion Task Force, 2008.

Further guidance and support

If you have any questions at all about monitoring the outcomes of your advice work with young people, do not hesitate to contact:

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2 Taylors Yard,
67 Alderbrook Road
London SW12 8AD

telephone 020 8772 9900

email advice@youthaccess.org.uk

Or visit our website, which contains a range of good practice resources at: www.youthaccess.org.uk/resources/goodpractice/monitoring/Monitoring-your-Outcomes-and-Impact.cfm

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This guidance draws heavily on a number of key sources:

- *A Practical Guide to Outcomes for Advice*, Advice Services Alliance, 2005.
- *Client Outcomes: Recommended approach and resources*, Citizens Advice, 2009.
- *Think Research*, Social Exclusion Task Force, 2008.
- Version 1 of the *Youth Advice Outcomes Toolkit*, Youth Access, 2007.
- *Youth Advice Outcomes Pilot*, Evaluation Trust for Youth Access, 2010.

The Forms

The *Have we helped?* form (basic version)

The *Have we helped?* form has been designed for clients of youth advice services to self-assess their soft/personal outcomes, such as changes in their confidence, their health or their ability to deal with their problems.

The *Have we helped?* form is to be completed once, some time after the initial provision of advice, to allow time for the advice to take effect.

Precisely, when and how you should get young people to complete the form is largely up to individual agencies to determine – refer to the *Guidance*.

This basic version of the *Have we helped?* form may be tailored to meet your agency's needs. For example, you can add in optional additional survey questions (see p. 27) or optional management information – please refer to Step 3 in the *Guidance* for further details.

basic version

Have we helped?

It is very useful for us to know the **difference our advice has made**.

We will use your answers to improve our service and to show whether youth advice services make a difference.

Please tick (✓) one of the boxes for each statement to indicate any changes you feel have happened as a result of our services.

As a result of getting advice here …	*Improved a lot*	*Improved a bit*	*Not changed*	*Got a bit worse*	*Got a lot worse*	*Don't know/ not applicable*
My levels of **stress** have …						
My **understanding of my rights** has …						
My ability to **deal with problems myself** has …						
My knowledge of **where to get help** has …						
My **feelings about my future** have …						
My **housing situation** has …						
My **income** has …						
The way I **manage my money** has …						
My involvement in **education/ training/employment** has …						
My **family situation** has …						
My **behaviour** (in relation to what others expect) has …						
My **health** has …						
My **confidence** has …						
My **overall enjoyment of life** has …						
My **control over my life** has …						

Thank you very much for completing this form!

Optional additional survey questions

In this section we suggest some potential additional questions for the *Have we helped?* form that could be used by those agencies wanting further data on the impact of their youth advice services.

It is tempting to over-complicate this kind of survey by including a large number of questions. It is highly recommended, however, that you limit the number of additional questions you include on the form to a maximum of two or three. You may not need any if you are primarily seeking quantitative outcomes data or want to keep your exercise simple.

In selecting any additional questions, think carefully about how you are going to analyse and make use of the extra data.

1 Optional questions that could be inserted at beginning of the *Have we helped?* form:

- How much of your time would you say you were spending worrying about your problem(s) before you came for advice?
  All of my time *Most of my time* *Some of my time* *Little of my time* *None of my time* *Not sure*
- Did you get the advice you needed? *Yes* *No* *Partly* *Not sure*

  or
- Did our advice help you? *Yes* *No* *Partly* *Not sure*
  If so, how did our advice help you? (followed by open box)

2 Optional qualitative outcome survey questions that could be inserted on page 2 of the *Have we helped?* form:

- Are there any other things that have changed in your life as a result of our advice? (followed by open box)
- What has been the biggest change for you as a result of our advice? (followed by open box)
- What do you think would have happened to you if you hadn't received our advice when you did? (followed by open box)
- What action are you going to take/have you taken as a result of the advice you received? (followed by open box)

3 Optional qualitative user satisfaction survey questions that could be inserted on page 2 of the *Have we helped?* form:

NB: There are pros and cons to integrating your outcomes monitoring with your user satisfaction monitoring. Whether it makes sense will depend to some extent on the nature of your existing systems.

- Was there anything you particularly liked about the service you received? (followed by open box);

  or

- Was there anything in particular that you think made the advice effective? (followed by open box)
- Is there any other feedback you would like us to know? (followed by open box)

The Adviser form

The *Adviser* form has been designed to enable agencies to record any factual information that the agency may want to use to cross-reference with young people's self-assessed personal outcomes when analysing the data, including:

- User profile – e.g. gender, age, ethnicity, social exclusion factors
- Help given – e.g. level of advice, types of issues
- Hard outcomes.

The *Adviser* form is entirely optional. Indeed, it is unlikely to be suitable for most agencies, as it will complicate your data collection and analysis considerably. We do not recommend its use where agencies are intending to collect data on fewer than 50–100 clients, as it is unlikely that this would produce enough data to make cross-referencing soft outcomes with other data worthwhile.

The forms may be adapted to suit your agency's needs – refer to Step 3 in the *Guidance*.

The *Adviser* form is to be completed by the adviser. It will often prove easiest for the whole of the Adviser form to be completed at or around the same time as the *Have we helped?* form.

If you decide to use the *Adviser* form, make sure that you complete the client reference field on the *Adviser* form and add a client reference field to the *Have we helped?* form, so that you can link the information from the two forms together for analysis.

The Adviser form

Section 1: User profile

Client reference ______________________

Date __________

1 Gender (✓)

Male ☐ Female ☐

2 Age (✓)

(Example – you can amend these age categories to fit with your existing systems and reporting requirements)

Under 13 ☐ 13–15 ☐ 16–18 ☐ 19–21 ☐

22–24 ☐ 25 + ☐ Not known/asked/recorded ☐

3 Ethnicity (✓)

(Example – you can amend these age categories to fit with your existing systems and reporting requirements)

White ☐ Black ☐ Asian ☐ Mixed ☐

Other ☐ Not known/asked/recorded ☐

4 (Known) social exclusion factors Tick as many as apply (✓)

(Suggested, but these can be amended)

Not in Education, Employment or Training ☐

Young carer ☐

Sick or disabled ☐

Mental health problems ☐

Substance misuse problems ☐

Young offender ☐

Homeless ☐

Living in care, prison or other institution ☐

Care leaver ☐

Young parent or pregnant ☐

Young refugee or asylum seeker ☐

Parental substance misuse/mental health problems/offending ☐

Some agencies may wish to add in an additional section here on source of income or housing status.

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Section 2: Help given

A Level of advice given (✓) one box only)

1 One-off advice ☐

2 Further advice/assistance ☐

3 Advocacy/putting case for the client ☐

4 Representation at court or tribunal ☐

B **Rights-based issues on which advice given to client** (✓)

Housing/homelessness ☐

Debt ☐

Employment rights ☐

Education rights ☐

Welfare Benefits ☐

Health and Social Care rights ☐

Consumer problem ☐

Crime/Youth Justice ☐

Immigration and nationality ☐

Human rights/discrimination ☐

Other (please specify) ______________________________

C Other issues advised on (✓)

Relationships ☐

Mental health ☐

Sexual health ☐

Drugs and alcohol ☐

Education, employment and training, careers ☐

Other (please specify) ______________________________

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Section 3: Hard outcomes

D Status of case ✓

Client referred ☐

Awaiting outcome ☐

Outcome not known ☐

Client taking action themselves ☐

No outcome expected ☐

E Hard advice outcomes achieved for client

Please indicate all outcomes that apply ✓

Financial position improved ☐

Housing position improved ☐

Education/training/work position improved ☐

Health and social care position improved ☐

Other hard outcomes (please specify) ____________________

Some agencies may wish to record hard outcomes in greater detail.
Some agencies may wish to add in a 'Referred to' field.

The Youth Advice Outcomes Toolkit

This toolkit has been produced by Youth Access with support from the Big Lottery Fund as part of the Working Together for Advice Project

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