

## [Service Name] Evaluation Strategy – A Mixed-Methods Approach

### 1. Introduction

[Name of service] provides advice and advocacy to individuals who face complex social and legal challenges, including housing insecurity, welfare rights issues, safeguarding risks, and barriers to accessing mainstream services. Support varies in intensity, from one-off advice to ongoing advocacy casework. The aim is to achieve both immediate issue resolution and longer-term improvements in client confidence, stability, and well-being.

Evaluation is critical to understanding the impact of the service, supporting operational learning, and strengthening funding and commissioning cases. A mixed-methods evaluation approach has been chosen to capture both breadth and depth of evidence about client outcomes and pathways of change.

### 2. What we will do

This evaluation will take a mixed-methods approach, combining quantitative and qualitative methods to ensure comprehensive data collection. It will:

- Use standardised client surveys to measure outcome patterns across the service.
- Use qualitative interviews and focus groups with clients and staff to explore deeper pathways of change.
- Collect evidence against the organisational outcomes framework, focusing on areas such as financial security, access to rights, and client empowerment.
- Apply the evaluation tools developed as part of this toolkit: the standardised Advice and Advocacy Survey, and a qualitative interview schedule and focus group framework.

### 3. Why we will do it

Mixed-methods evaluations help organisations learn by bringing together different types of evidence to build a clearer and more complete picture of service impact. This approach makes it easier to spot patterns, explain differences in outcomes, and understand how and why change happens for different groups of clients. It is particularly well-suited to advice and advocacy services, where the client group is diverse, where engagement can vary widely in length and intensity, and where outcomes are often a combination of immediate improvements and longer-term changes. Using both survey data and qualitative feedback ensures that the evaluation captures not just the number of people helped, but also the quality and depth of the changes made. This produces evidence that is credible for funders, practical for service improvement, and closely reflects the real experiences of the people supported.

### 4. How we will do it

The evaluation will be delivered across eight structured stages: data audit, measurement design, evaluation strategy, tool design, sampling, data collection, analysis, and reporting. Each stage is designed to build progressively towards a practical and operationally useful evaluation, supporting service improvement, strategic development, and credible outcome reporting.

- **Data Audit** - At this stage, we'll conduct a structured data audit to map current data sources, categorise existing data by type, assess operational usefulness, and identify gaps that impact evaluation. The aim of this stage is to build a clear

Cont.....



- ... picture of what data the organisation already holds, what areas are well-covered, and where new or better data collection is needed to support meaningful outcome evaluation.
- **Sampling** - At this stage, we'll define the sampling approach for each data collection method, identifying who data will be collected from, when, and how often. Sampling will be proportionate to the intensity of service delivery and the size of the client base. The aim of this stage is to ensure that the evaluation gathers a sufficient range of client experiences to produce credible, usable findings, without placing undue burden on service users or staff.
- **Measurement Design** - At this stage, we'll develop new outcome measures or select appropriate measures from an existing outcomes framework, depending on the needs of the service. Outcomes will describe the intended areas of client change, while indicators will specify what signs of change we expect to see. The aim of this stage is to create a clear, shared framework that links data collection directly to meaningful evidence of service impact.
- **Evaluation Design** - At this stage, we'll design the overall evaluation approach, selecting the combination of methods that best fit the service model, client engagement patterns, and intended use of the findings. This may involve a mixed-methods strategy using surveys, case studies, and qualitative interviews, or a lighter-touch approach focused on one or two methods. The aim of this stage is to ensure the evaluation is proportionate, feasible, and aligned to operational priorities.
- **Tool Design** - At this stage, we'll design or adapt the specific tools needed to collect data, such as client outcome surveys, staff case study forms, and interview or focus group topic guides. Tools will be directly linked to the agreed outcomes and indicators to ensure data collected is focused, relevant, and usable. The aim of this stage is to produce practical, easy-to-use instruments that embed evaluation naturally into service delivery.
- **Survey Data Collection** - All clients receiving support during the evaluation period will be invited to complete the standardised outcomes survey at or near case closure. The survey will measure client change across key outcome areas, using consistent questions and standardised response scales to ensure comparability across responses.
- **Qualitative Data Collection** - A sample of clients and staff will be invited to participate in semi-structured interviews or focus groups. Participants will be purposively selected to reflect the diversity of service types, client demographics, and case complexities, ensuring that qualitative insights provide a broad and meaningful understanding of service impact.
- **Analysis** - At this stage, we'll analyse the data collected, using simple descriptive statistics for survey responses and thematic analysis for qualitative material such as case studies and interviews. Analysis will be structured around the outcomes framework to ensure that findings are directly linked to evidence of client change. The aim of this stage is to turn raw data into meaningful, actionable insights that support service improvement and strategic decision-making.
- **Report** - At this stage, we'll present the findings from the evaluation clearly and accessibly, linking evidence back to each outcome area. Reporting will combine quantitative summaries with qualitative insights to provide a balanced, outcome-focused account of the service's impact. The aim of this stage is to communicate results in a way that supports operational learning, demonstrates value to funders and stakeholders, and informs future service development.

5. Timeline

The evaluation activities will be delivered in a structured sequence to ensure that data collection, analysis, and reporting are completed efficiently and to a high standard. The table below sets out the key activities and expected timeframes for each stage of the evaluation process.

Activity	Start Date	End Date
Conduct data audit	[Insert Start Date]	[Insert End Date]
Finalise evaluation tools (survey and topic guide)	[Insert Start Date]	[Insert End Date]
Client survey data collection	[Insert Start Date]	[Insert End Date]
Client and staff interviews/focus groups	[Insert Start Date]	[Insert End Date]
Data analysis	[Insert Start Date]	[Insert End Date]
Draft evaluation report	[Insert Start Date]	[Insert End Date]
Final evaluation report	[Insert Start Date]	[Insert End Date]

6. Appendices

The following materials will be included in the appendix to support the evaluation process:

- The Standardised Advice and Advocacy Outcomes Survey
- The Qualitative Interview and Focus Group Topic Guide
- The Outcomes Framework.

These tools form the core of the evaluation approach and provide the structures needed for consistent data collection, outcome measurement, and qualitative exploration across the service.

How to Cite This Work

Community Impact CIC (2025). Advice and Advocacy Evaluation Toolkit: Practical Guide and Tools for Impact Measurement. London: Community Impact CIC.

Copyright Notice

© Community Impact CIC 2025. All rights reserved. No part of this publication may be reproduced, stored, or transmitted in any form or by any means without the prior written permission of Community Impact CIC, except for non-commercial use with appropriate citation.