Where should small charities start with evaluation?

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For many small charities, evaluation can feel like one of those things you know you should be doing... but often gets pushed to the bottom of the to-do list. Whether it's limited capacity, money, or staff, it seems a bit complicated, with a plethora of terms to learn.

But when you look at what evaluation is, in essence, it's understanding whether your work is making the difference you want it to make.

Why is evaluation even necessary?

- It helps you to understand what is working well,
- Where you can improve, tell a confident story to funders, supporters and partners,
- It fundamentally helps you to focus your time on doing more of what is working, and stop wasting energy on what doesn't.

Below, for all the small charities, grassroots organisations and community groups with limited resources and capacity who might be interested, is a step-by-step process for building a strategic or project-based evaluation plan. One that you can do as lightly as you wish, but one that should help you articulate your vision for change and build a plan of how you'll know when you've achieved that.

Step 1: Building a Simple Theory of Change.

When you're thinking about evaluation, the very first step is creating a **Theory of Change**. This might sound technical, but it's simply a way to document the change you want to make and how you plan to make it happen.

A Theory of Change helps you answer questions like:

- What are we aiming to do?
- Who are we helping?
- How do we think change happens?
- What difference do we hope to see?

Most small charities already *know* these things intuitively; the Theory of Change just captures them clearly in one place.

Table 1. An example of a very basic framework (sometimes referred to as a logic model), what is included, and an example.

	Inputs	Activities	Outputs	Outcomes	Impact
What this means	The resources you have available.	What you do with those resources.	What is delivered or produced.	The change people experience.	The long-term change you're working towards.
Example	A part-time youth worker and trained volunteer mentors.	Weekly mentoring sessions for young people aged 12–16.	50 mentoring sessions delivered to 30 young people.	Young people report improved confidence and better engagement at school.	Young people have improved long-term life chances.

There are obviously levels of detail you can go into with this, but the idea is to be strategic and proportionate to the time and capacity you all have as a small charity, and to articulate the work aims and impact you want to have. This process can help your team (if you have one) to collaboratively decide what is important and what you're working towards. As well as referring back to when you're making decisions about what you want to do, ensuring that everything aligns with that.

Step 2: Creating a Light-Touch MEL Framework

Once your Theory of Change is clear, you're ready to decide how you'll track progress. This is where a **Monitoring, Evaluation and Learning (MEL) framework** comes in. This is simply a plan of what you could measure against the outputs, outcomes and impact in the Theory of Change. Which is why articulating it above is the necessary first step. If you don't know what you're trying to achieve, how do you know what you're measuring?

A MEL framework helps you:

- Identify what you want to measure
- Decide how you'll collect the information
- Track progress over time
- Stay accountable to those accessing the services
- Learn and adapt
- Communicate impact to funders

And crucially: **it doesn't need to be lengthy or complex.**

Table 2: An example of the 'Outcome' evaluation table.

Outcome	What could we measure	How could we measure	Who / When	What will you use this for
Increase in confidence as a result of the workshop	Pre and post-self-evaluated confidence	Pre/Post question (scale 1-10) Case studies	before and after the workshop + asking x% 3 months later by the delivery staff.	E.g., self-learning/annual reports/funding bids

Step 3: Choosing What to Measure

I often see small charities conducting impact measurement well but in a sporadic, ad hoc way, measuring what they can, when they can.

It's understandable, but it can be more time-consuming and less effective than having a clear plan.

Once you've created a framework that outlines how each output and outcome *could* be measured, it's important to recognise two things.

- The first is that not all change is easily measurable. This is true both in terms of accessibility and feasibility. Some types of change, such as improved self-esteem or longer-term societal impact, are inherently broad and challenging to capture.
- The second is capacity; it's time-consuming and impractical to measure everything.

This can help you focus on measuring what truly matters and what is genuinely possible. When working with small charities, I would usually guide them through the options of measuring everything, then we would choose the priority areas for a time period, say 'measure the engagement in the sessions for 6 months'. This often gives you enough data to learn from and base decisions on, so you can stop and move on to the next.

This allows you to prioritise, avoid over-evaluation, and not just capture data for the sake of numbers.

When I worked with Youth Access, a membership organisation supporting local youth hubs, I helped them develop a Monitoring, Evaluation and Learning (MEL) framework to better understand their work with members. After around 12 months of embedding the core measurements, we introduced an engagement ladder to explore the depth and quality of their relationships with different member organisations.

Two years on, Youth Access is still using this data to understand what's working, where to prioritise their efforts, and which audiences are most and least engaged. This has enabled them to be far more intentional about their membership offer and how they support their network.

Common pitfalls:

Here are a few light-touch reminders that can save you time and frustration:

1. **Don't collect data you don't need**
2. **Keep tools short**
3. **Connect everything back to your Theory of Change**
4. **Build evaluation into everyday practice**
5. **Keep it proportionate to your size and capacity**

Your evaluation approach should feel supportive - never overwhelming.

Evaluation doesn't need to be perfect to be valuable. At its heart, it's about understanding whether your work is making the difference you hope it will, and using that learning to strengthen what you do.

By starting with a clear Theory of Change and choosing a small number of meaningful things to measure, small charities can build evaluation into everyday practice in a way that feels manageable and useful. Start small, stay focused on what matters most, and allow your approach to grow and adapt over time.

Who am I?

I'm Sarah Burrows, a freelance evaluator with over 10 years of experience in impact measurement, research, and evaluation, I've had the privilege of working with charities of all sizes, but I really enjoy supporting small charities and organisations that are creative, committed, and often overstretched, yet delivering incredible impact on the ground to local communities every day.

My approach is simple, supportive, and grounded in real-world practice. I specialise in helping small charities build evaluation systems that are light-touch, practical and useful, whether that is doing it or mentoring and facilitating or training teams to do it themselves.

If you'd like support developing a Theory of Change, building a light-touch evaluation framework, or sense-checking what you're already doing, please reach out. Getting the right support early on is a game-changer. It'll save you time, make you feel more confident, and guarantee your evaluation genuinely helps your work instead of just piling on the to-do list.

Click here, to contact me, via Blume!