

Who is this guide for?

- Senior decision-makers
- Policy staff
- Evaluation and data staff
- Delivery staff

When should I use this guidance?

Design stage and ongoing delivery.

Building management information (MI) and evaluation into work and health programmes from the outset is critical to understanding what works, for whom, where (including in devolved nations and areas), and why. This requires MI systems and evaluations to be commissioned alongside the programmes they evaluate.

Evidence from the [Health-led Trials](#) and the [Cumbria Youth Alliance: Forging Futures Programme](#) shows that effective programmes integrate MI and evaluation into their core design.

TIP: Design MI and evaluation requirements alongside the delivery model.

Planning MI and evaluation requirements alongside the delivery model ensures that the right data is collected. This helps avoid evidence gaps, establish clear timings and approaches for data collection, and ensures that roles and responsibilities for data collection are clear. While the scale of evaluation should reflect available resources and programme duration, early planning is important.

Commissioners should ensure that proportionate evaluation activities are planned at the design stage.

- For larger programmes, such as the Health-led Trials, this could include impact, process, and economic elements, supported by administrative data, surveys, and qualitative research
- For smaller programmes, this could include a process evaluation informed by qualitative research and MI data analysis.



TIP: Ensure sufficient staff capability and adequate funding.

Robust MI and evaluation are key to understanding programme performance and impact, identifying ‘what works’ in delivery, and identifying emerging challenges. To be effective, they require analytical capacity, trained delivery staff, and appropriate funding for developing data capture tools. The Health-led Trials benefited from having funding to embed these features across the programme, but this may not be feasible for all programmes.

As far as feasible, commissioners should, at minimum:

- Invest in data systems that support data capture and analysis.
- Provide guidance and training for staff in using data systems, effectively gathering the required information, and understanding how the data and insights can be effectively utilised.
- Ensure providers understand the importance of accurate and consistent data collection.



TIP: Have a clear theory of change to guide data and evaluation requirements that is regularly reviewed and updated.

A theory of change helps define how programme activities are expected to lead to intended outcomes, including intermediate steps such as improvements in confidence or wellbeing. It can provide a structured framework for delivery and evaluation, ensuring that the right data is collected to monitor progress.

It is important that any changes to programme delivery and outcomes pathways are monitored, with any changes clearly documented and reflected in MI and evaluation plans.

Commissioners should:

- **Ensure programmes define contractually intended outcomes and the intermediate steps to achieving these** (such as improvements in confidence or wellbeing).
- **Consider the data required to track progress against these outcomes** and how this can be collected within MI and evaluation activities.

The Health-led Trials developed detailed theories of change to map how interventions were expected to lead to outcomes. These frameworks shaped both programme delivery and evaluation, and were reviewed and refined during the course of delivery.



TIP: Conduct feasibility tests to understand data sharing and linkage requirements.

Understanding data sharing and linkage requirements early helps ensure that data can be effectively used for robust evaluation. Feasibility testing allows programmes to identify potential barriers, establish appropriate governance and data sharing arrangements, and design analysis approaches. Linking different data sources can allow programmes to track outcomes over time, understand what mechanisms work best in delivery for different groups, and develop comparison groups.

Several evaluations considered in the evidence review, notably those conducted using PHIRST and Youth Futures Foundation support (including the Cumbria Youth Alliance (CYA) Forging Futures Programme), included feasibility studies to explore this.



TIP: Align and embed MI capture with routine delivery, performance management, and learning.

Effective programmes integrate MI into everyday processes so that it is consistently collected and used by delivery staff. If MI processes are overly complex or burdensome, delivery staff may see them as too bureaucratic and taking their time away from supporting service users.

Focusing on collecting the minimum data needed for maximum impact, and ensuring staff understand the value of MI, helps improve data quality, staff buy-in, and programme effectiveness. Regular review of data also supports shared learning and problem-solving across partners.

To improve MI integration with delivery, programmes should:

- **Use pilots where possible to identify what data can realistically be collected** and how, identify inconsistencies, and reduce burden on delivery staff. This supports agreement of standardised definitions and minimum datasets before scaling up.
- **Ensure MI data collection collects the minimum amount for the maximum impact**, without recording excessive and unnecessary data. Programmes should consider restricting data collected to that which is needed to describe the number of people supported, their characteristics or needs, outputs and outcomes achieved, and activity undertaken. This will enable you to understand and evidence the link between activity and outcomes and who achieved them.
- **Identify ways that data capture can be embedded in delivery activities and discussions.** CYA embedded its My Evaluation Tool into one-to-one sessions, combining individual support with MI capture. Link Workers and young people used it as a structured, conversational assessment to explore ten support needs and co-design action plans once rapport was established.
- **Secure staff buy-in to MI capture and evaluation activities by sharing findings at regular intervals and linking these to practice;** for example, CYA's Forging Futures Programme shared MI data showing the number of young people supported and moved into work on LinkedIn to promote its service.
- **Have regular reviews and forums to analyse data and stimulate discussions across partners.** These forums should support shared problem-solving and ongoing programme improvement.



These top tips are based on evaluation evidence identified through a [Rapid Evidence Assessment \(REA\)](#) on what enables effective design, delivery and evaluation of local work and health programmes.

The top tips in this guide have been given a confidence rating of indicative - moderate. This means that the evidence these top tips are based on is suggestive and cannot be directly linked to outcomes. It also means that the evidence comes from at least one study which has been rated as moderate using the [Youth Endowment Fund Evidence Quality Assessment tool](#).