

# Developing a monitoring and evaluation strategy

**This case study is about how Self-directed Support Scotland used 'a resource for understanding intermediaries' impact' to develop their monitoring and evaluation strategy.**

**Read it if you are an intermediary or a funder of an intermediary**

## Background



In February 2018, ESS launched a pack '[A resource for understanding Intermediaries Impact](#)'.

Jess Wade, the manager of Self-directed Support Scotland came along to the launch event. They were in the process of developing an implementation and evaluation plan for their new strategy and used the resource for ideas.

## What we did

We adapted the template on page 15. We created sections for each outcome and added in columns for activities and targets. Our grid looks like this

Outcome					
1. Indicator 2. Indicator 3. Indicator 4. Indicator					
Indicator	Activity	Target	How to collect evidence	When and who to collect baseline	When and who will collect data
By no.					
	Activity 1				
	Activity 2				
	Activity 3				

We used appendix two: evaluation methods (page 22) as a way to think about how we describe activities and methods for measuring them.

We found the section on challenges for intermediaries reassuring. It helped us to see that others find the same things difficult and that it was ok to:

- focus on outcomes and indicators within our control
- note our general contribution and not try to attribute specific impact
- accept some things (like the value of networking) are important but hard to measure
- look for good enough evidence rather than perfect evidence.

This helped us to be pragmatic about our plan and focus on collecting information that is realistic and fits into our way of working.

## What we found

We are already collecting a lot of information that will feed into the plan. We have ways of recording many of our activities on Salesforce (database) and marking outcomes against them. In some

ways the plan helps us to see why collecting this information is important.

The plan should make it easier to decide what to put in the annual survey for members and stakeholders, what offline evidence to keep (e.g. local action plans), and when to follow people up.

Analysis and reporting should be easier because we are coding as we go along and are clear what evidence to expect against each outcome.

## **If you are thinking of using the resource**

It's useful as a whole resource, it gives you the confidence to be pragmatic. We all know this stuff about challenges, but nevertheless you can feel like you are making excuses or not good at your job.

It's also good to have something that clarifies and breaks down the various roles of the intermediary. It's good to think are there other things we could be doing?

If you are looking at policy influence think about using the ESS guide [Charting the waters](#): a guide for the third sector on how to influence policy influencing work. In the framework for measurement (in part two) there are sample indicators which we used to identify our own. It might be hard to show change in actual policy, but you can show step change along the way such as being invited to meetings, having the confidence to present your case and so on.



**Self Directed Support Scotland**  
the organisation of choice

Self-directed Support Scotland is a membership organisation that represents organisations run by and for disabled people, our members support thousands of people across Scotland with their social care choices. Together we work to ensure that SDS is implemented successfully so that people have full choice and control over their lives.

We have 5 members of staff and around 40 members.

## **Contact details**

If you want ESS's support please contact Evaluation Support Scotland by email:

[info@evaluationsupportscotland.org.uk](mailto:info@evaluationsupportscotland.org.uk)

or phone 0131 243 2770

Please see our website for '[A resource for understanding Intermediaries Impact](#)' and lots more guides, tools and resources

<http://evaluationsupportscotland.org.uk/resources/>

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