

# Evaluation Method: Taking stock in a time of change

## Overview

In a time of rapid change, we have to respond more quickly and learn as we go, changing and adapting our services or approach as needed. It's helpful to capture key evidence, learning and actions periodically.



## What's required

- Space and time to reflect on your own or as a group
- Your experience and information about what you have done, with who and with what impact
- The materials that will help you to do that (a basic agenda and questions and/or creative methods to get you thinking)
- A way of recording your thoughts (paper, flipchart and pens, a template, whatever suits your way of working)

## Process

Either individually or with colleagues reflect on some key questions:

- Are our service users able to reach us and vice versus?
- What difference are we making?
- Are we focused on meeting the needs our service users have right now?
- Are we using the best approaches to reach and support our service users?
- Who is our support working for? Who is it not working for?
- What do we need to change now?
- What learning might be helpful for the future?

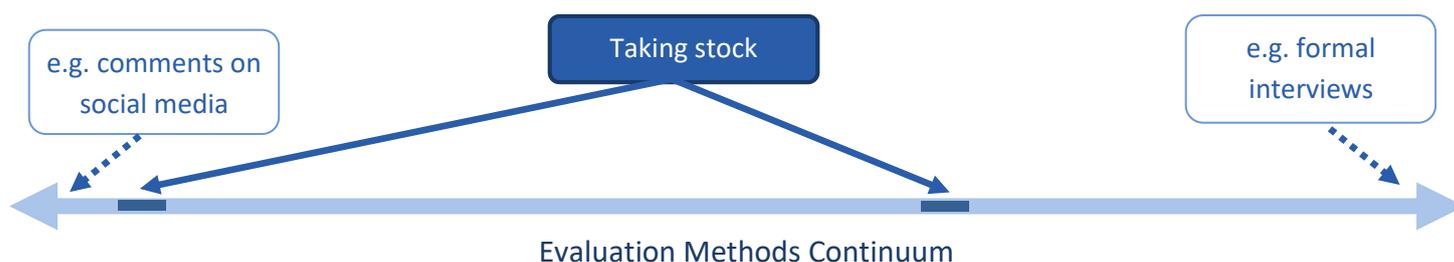
**See ESS support guide 4b Reflective Practice** for more ideas about creative ways to stimulate reflection and discussion.

## Capturing evidence

Record key points using a simple method. **See overleaf** for different tools you could use. Pick or adapt whichever tool suits you.

## Useful for

Capturing key information as you reflect and plan, so that when it comes to reporting it's easier to remember how and why you developed the service or approach. It is also a way to feed the experience of front line staff into planning.



Taking stock in a time of change

Evaluation Support Scotland

Charity No. SC036529

### Tools for capturing evidence

Below are four examples of how to capture your discussion. Pick or adapt the tool that works for you.

1. **A change record sheet** to note key changes that you make and why. The template below is available [here](#) on our website.



**Change Record** Project Name: \_\_\_\_\_

**Which aspect of your project is this change related to?**

- reaching people / referral systems
- working with volunteers
- keeping participants engaged
- evaluation
- \_\_\_\_\_

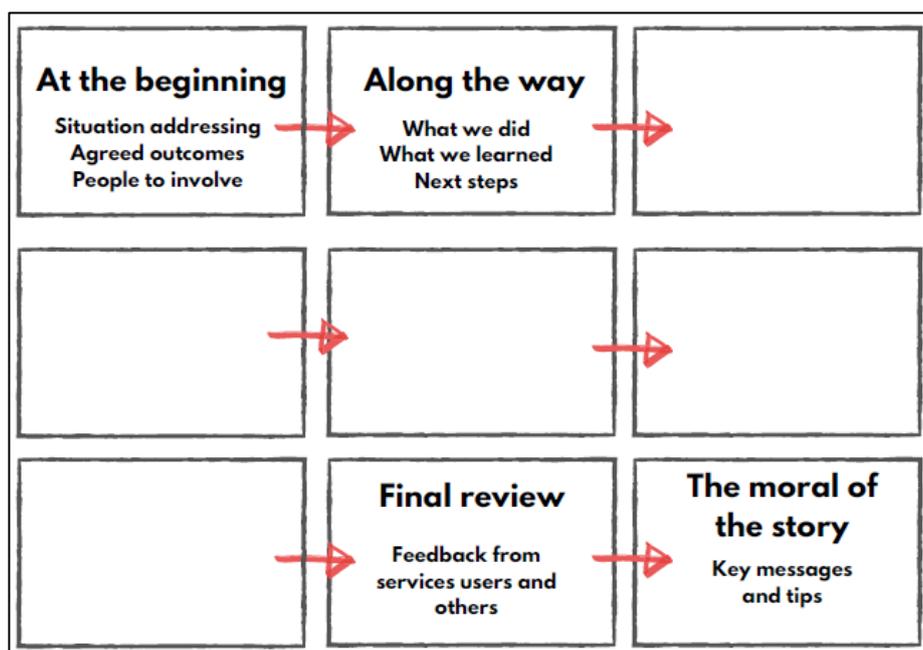
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*In order to provide the best and most effective services, it's important to find out **what does and doesn't work**. Just by running your project you will be learning lots about this without even realising! This template may help you record what **adjustments** you have made to how you run your project (even small changes can be significant), **why**, and what **difference** this has made. Consider sharing what you learn with your funders and other similar projects*

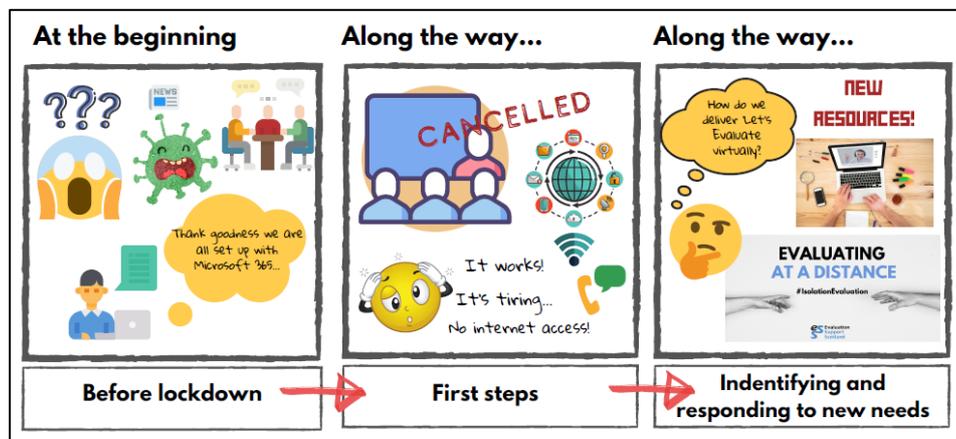
<p><b>1. What did you originally plan to do?</b></p>	<p><b>2. What didn't work about the original plan? Why?</b></p>
<p><b>3. What did you decide to try instead?</b></p>	<p><b>4. What difference do you hope this change will make? / has this change made? How will / do you know?</b></p>

[www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk) Charity Number: SC036529 Company Number: SC284843

2. **A story board** - a visual tool you can fill in at key stages along the way (e.g. weekly). You could also use this tool to help you reflect after a given period of time. This story board, or an edited version, might be used in your reports.



### Story board section example



3. **A meeting/ reflections template** – the one below is filled in with a made-up example to show how it might be used

<b>Meeting record example</b>	
<b>Week 1 - Key facts about activity and reach</b>	
<ul style="list-style-type: none"> <li>• Contacted our regular service users by phone and email</li> <li>• Able to contact 90% and most were coping</li> <li>• Several volunteers had to self-isolate, so support was down</li> <li>• We provided support to 56 people (focused largely on meeting basic needs, for example shopping, picking up prescriptions etc.)</li> <li>• Referrals for new people came from social work, neighbours</li> </ul>	
<b>Emerging trends/ issues/ points</b>	
<ul style="list-style-type: none"> <li>• Rich source of volunteers from people that are restricted from working</li> <li>• Still need to do checks and basic training</li> <li>• Need to find virtual ways of supporting people, phone, video calls</li> <li>• Not everyone on social media, IT literate or has access to the internet</li> </ul>	
<b>Actions</b>	
<ul style="list-style-type: none"> <li>• Widen our criteria for support</li> <li>• Focus on basic needs first</li> <li>• Make more use of social media to advertise support</li> <li>• Do a leaflet drop</li> <li>• Liaise with local IT charity so service users can access personal IT equipment</li> </ul>	

4. **A learning log** - for example, a word document saved online where you and colleagues can note and share experiences and learning.