Understanding Intermediaries’ Impact: a resource

February 2018
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Section one: Introduction

This resource is for third sector national intermediaries, their boards and the people who fund them or work with them, including policy makers.

Our aim is to help third sector intermediaries and those who work with them to be clear about the role and impact of intermediaries and to have helpful discussions about what evidence to collect and report on.

How to use the materials

In the first three sections of this resource we explain the background to this resource being produced, outline what we mean by a national third sector intermediary and consider why intermediaries are needed.

In section four we look at the core roles and functions, outcomes and activities of third sector intermediaries. This is crucial to understand what to evaluate.

In section five we consider in broad terms how to explain and measure the impact of intermediaries. We look at the key steps for agreeing an evaluation and reporting plan and identify particular challenges for intermediaries.

Section six provides a set of questions to help you to think about and discuss outcomes, activities and measurement.

In appendices we include some templates for outcome and activity planning, evaluation planning and reporting.

Background

This piece of work was funded by the Scottish Government Third Sector Unit.

Evaluation Support Scotland (ESS) first undertook a scoping report to gauge appetite for this work and to identify what is working well and any challenges. The scoping study involved desk research and speaking to 13 intermediary staff members and five Scottish Government officials.

This was followed up by a seminar attended by 39 people, including Scottish Government Officials and a wide range of third sector intermediary staff members. At that seminar ESS was given a steer to develop this introductory resource, based on the findings from the scoping report and the seminar.

ESS worked with a small working group to develop the resource. The aim is to share and promote this resource amongst Scottish Government officials and other funders, as well as intermediaries. This may be followed up by more in depth work on “how to” measure and report on outcomes.

1Jayne Chappell, Social Firms Scotland; Claire Stevens, Voluntary Health; Euan Leitch, Built Environment Forum Scotland; Simon Massey, Children in Scotland; Sarah van Puten, Befriending Networks; Laura Mulcahy, Criminal Justice Voluntary Sector Forum; Allan Young, Scottish Council for Voluntary Organisations; Iain Forbes, Scottish Mentoring Network; Mark Meiklejohn, Scottish Government.
Why this resource is needed

Third sector national intermediaries play an important role in the Scottish third sector landscape. They represent and support their members and their sector. They can help government and others to better understand the needs of a particular group or around a particular issue. They can also help those member organisations to better support strategic outcomes.

However:

- there is great diversity in terms of the size, roles and functions adopted by particular intermediaries
- in some policy areas there is more than one intermediary and it may seem confusing about which intermediary does what.
- different people may view the intermediary differently and may not see the whole picture: for example members might be more aware of support services, policy makers may be more aware of influencing work.
- some of the roles and purpose, whilst important, can seem quite nebulous and difficult to measure e.g. communication and networking, building collaborations and partnerships. As one intermediary staff member said

  “we need a clear way of describing what we do”

This resource is an attempt to describe what intermediaries do, the kind of impact they have and what can be measured.
Section two: What is a national third sector intermediary?

This is a third sector\(^2\) organisation, whose members are mainly other third sector organisations\(^3\) and whose role (partly or wholly) is to represent and support those members.

Intermediaries are legally independent and are governed by a Board of Trustees and led by members.

Scottish Council for Voluntary Organisations (SCVO) have identified over 60 national intermediaries in Scotland\(^4\) which ‘form part of the third sector infrastructure’\(^5\) and ‘exist to support the work of other third sector organisations (TSOs)’\(^6\). Some intermediaries are generic and support all TSOs, whilst others support TSOs working in particular fields or policy areas.

SCVO convenes the Intermediaries Network for their members (approximately two thirds of intermediaries).

National intermediaries can be important partners for government and funders as their members and networks contribute to a range of policy areas and national or strategic outcomes.

Go to the knowledge hub for links to information about the size and scope of third sector national intermediaries and the mapping of policy areas that different intermediaries are working in.

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\(^2\) All third sector organisations have an unpaid board that acts purely in the interests of the organisation, are independent of government, and are not driven by profit or run for private gain – while many organisations make a profit, this is always re-invested back into the organisation and its work. (Scottish Council for Voluntary Organisations)

\(^3\) Some intermediaries also have members from the public and private sector. Some have individuals as members. Some have intermediary organisations as members.

\(^4\) SCVO Policy briefing ‘An introduction to Scotland’s national third sector umbrella bodies and intermediaries’, May 2017

\(^5\) Scottish Government website

\(^6\) SDEF Access Panel Conference 2015 Speaker Gareth Allen, Scottish Government
Section three: Why intermediaries are needed

I want to learn about and share good practice

I want a platform for my experience and expertise to be shared

I want a bridge into Scottish Govt, policy makers and decision makers

I want help to understand policy and have it interpreted for me

I want organisations to be strong (well governed, meet legal responsibilities and quality standards, skilled workforce)

I want to be part of a collective voice

I want organisations to be strong (well governed, meet legal responsibilities and quality standards, skilled workforce)

Intermediary members, networks and partners

But... I don't have the time or skills or resources to do all of this on my own

Policy makers

I want to co-produce policy with third sector organisations and those they work with

I want to access third sector evidence about what’s working and isn’t working

I want to hear and understand the lived experience of people

I want to reach a broader selection of third sector organisations

I want to know what’s important to third sector organisations, their client groups and communities

I want organisations to be strong (well governed, meet legal responsibilities and quality standards, skilled workforce)

But... I don’t understand the sector well enough to know who to talk to (and what about)

But... I don’t have time to find and speak to many people in the sector or distil the many voices and experiences I hear
I want to understand why a particular field of work or activity is important

I want to be clear about the outcomes that third sector organisations can achieve

I want organisations to reflect upon and share their evidence and learning

I want organisations to be following good practice

But...
I can’t be an expert on all areas of funded work

But...
I don’t have the time and detailed knowledge to support organisations to build organisational capacity

But...
I don’t know where to start looking

But...
I don’t have a lot of time to look around

Funders

I want to minimise risks (well governed, meet legal responsibilities, follow quality standards, skilled workforce)

I want organisations to be following good practice

But...
I can’t be an expert on all areas of funded work

I want to find people and organisations that I can collaborate with

I want to know who to refer to / signpost to

I want a critical friend

Other organisations
e.g. statutory and private providers, academics
In summary

Third sector member organisations want to be heard, be effective, make connections, collaborate, know what’s going on and learn from each other.

Third sector organisations have reach, experience and evidence to share that others want.

But many organisations and people lack time to make the links with others who can most help.

There is interest in developing a strong third sector that can help to contribute to achieving strategic outcomes.

So

Intermediaries play a key role as a conduit or bridge amongst their members and between members and others.

Intermediaries support their members to be strong organisations and to translate policy to their setting.

“I want a bridge into Scottish Government, policy makers and decision makers”
Core roles

Intermediaries

Provide a platform for member and sector voices

Support front line organisations to deliver well

Connect people and organisations

Intermediaries vary enormously in terms of size and take different roles and approaches. Some mostly focus on providing a platform for members' voices and policy influence. Others mostly focus on supporting the capacity of members and raising profile of the sector. Others do a mix.

Functions

Within these roles, there are 6 core functions\(^2\):

- Representation and policy influencing (identifying different perspectives on policy influence)
- Building and sharing intelligence and evaluation
- Information and support
- Organisational development and capacity building
- Developing and promoting good practice
- Creating opportunities for networking/collaboration.

Additional functions

A few intermediaries have additional functions:

- Run quality schemes/manage a Disclosure Scheme
- Support fundraising (e.g. run charity shops)
- Manage, distribute funding (often for Scottish Govt)

Non intermediary functions

Some intermediaries also deliver front line services for individuals and communities such as a public information service; or they run events or projects for their particular client group. These services are not covered by this resource.

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\(^2\) This builds on the core function identified by SCVO in their policy paper on national third sector umbrella bodies and intermediaries. Note that we have adapted the wording.
Intermediary outcomes

Below we identify in more detail the broad tasks and the main outcomes that come from the six functions.

In practice, intermediaries may express these differently depending on the context in which they work. They may also identify some more specific outcomes along the way to these broader outcomes.

For this resource we have looked for common outcomes as a way of thinking about evaluation challenges and ways of collecting evidence.

<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>TASKS</th>
<th>OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Representation and policy</td>
<td><strong>Inform</strong> members about current policy issues</td>
<td>Policy makers have increased understanding of the perspectives of members, people affected or community members</td>
</tr>
<tr>
<td>influencing</td>
<td>and identify emerging issues.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Facilitate</strong> discussions</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Creating</strong> meaningful opportunities for</td>
<td>Members/influencers/other providers have improved understanding of the needs of beneficiaries and what works</td>
</tr>
<tr>
<td></td>
<td>engagement and participation in policy</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Identify</strong> different member and network</td>
<td></td>
</tr>
<tr>
<td></td>
<td>perspectives in policy</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Communicate</strong> these views to policy makers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>and influencers</td>
<td></td>
</tr>
<tr>
<td>Intelligence and evaluation</td>
<td><strong>Develop</strong> the evidence base for policy and</td>
<td>Funders, policy makers and others have increased understanding of the role and impact of the third sector</td>
</tr>
<tr>
<td></td>
<td>practice</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Support</strong> members with research, monitoring</td>
<td></td>
</tr>
<tr>
<td></td>
<td>and evaluation</td>
<td></td>
</tr>
<tr>
<td>FUNCTION</td>
<td>TASKS</td>
<td>OUTCOMES</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Information and support</td>
<td><strong>Practical</strong> support services, from general information and signposting to direct services such as members’ helpline, payroll, finance, HR and IT</td>
<td>Members/third sector/other organisations have increased organisational effectiveness</td>
</tr>
<tr>
<td>Organisational development and capacity building</td>
<td><strong>Organisational</strong> and staff development support, including support and business planning, funding and tailored training for staff</td>
<td>Staff/volunteers have increased skills and knowledge</td>
</tr>
<tr>
<td>Developing and promoting good practice</td>
<td><strong>Facilitate</strong> the sharing of good practice among members and highlight best practice from elsewhere. This can include training programmes and toolkits for members, and setting agreed quality standards.</td>
<td>Members, third sector organisations and others have improved practice</td>
</tr>
<tr>
<td>Networking/making connections</td>
<td><strong>Provide</strong> communication and information channels</td>
<td>Members/ policy makers/ other providers have improved collaboration</td>
</tr>
<tr>
<td></td>
<td><strong>Facilitate</strong> networking and collaboration</td>
<td>Members / policy makers / other providers have increased connectedness</td>
</tr>
</tbody>
</table>
Types of intermediary activities towards these outcomes

There are a range of common activities across different intermediaries although some may use the same activity to achieve different outcomes. For example an intermediary might run an event to share learning or to gather information from the network to feed back to local and national influencers, or both. Websites provide a range of resources some of which are about understanding the policy context and others about developing good practice.

Common activities are:
- Websites
- Newsletters
- Social media activity
- Workshops/ training
- Events (topic based, networking, sharing good practice, consulting with the sector to gather views to feed into policy process)
- Information helpline or one to one support
- Mentoring programmes
- Resources and publications
- Briefing papers
- Facilitation to explore issues/solve problems
- Responding to consultations
- Commissioning or undertaking research.

I want to find people and organisations that I can collaborate with
Section five: Explaining and measuring intermediaries’ impact

In this section we look briefly at some of the key steps for agreeing your evaluation and reporting plan. We then consider some evaluation challenges for intermediaries that affect what is realistic to evaluate.

Key steps for agreeing your evaluation plan

We suggest anyone who evaluates should take the following steps:

ONE: Set clear outcomes
TWO: Agree what you are specifically going to do
THREE: Make the links between your outcomes and strategic outcomes
FOUR: Agree a plan for measuring outcomes
FIVE: Agree how and when to report

1. Set your outcomes

Key to explaining and measuring intermediary impact is being clear about what outcomes you hope to achieve and what activities are funded towards those outcomes. It helps if everyone speaks the same language. See ESS guide to setting outcomes.

A quick reminder about outcomes

- Outcomes are the changes or differences an organisation makes through its activities and services.
- To write outcomes use words like: IMPROVE DECREASE REDUCE EXPAND DEVELOP SUSTAIN (This relates to the HOW i.e. in what direction? See below)

How to write an outcome:

WHAT is changing for WHO and HOW E.g.
- Members have increased knowledge of policy
- Policy makers have improved understanding of the needs of the client group

Outcomes link to our understanding of need:

Need: members lack opportunities to network with other providers
Outcome: members have increased connections with other providers

Activities must link logically and realistically to planned outcomes:
Activity: Provide business planning advice to social enterprises
Outcome: Social enterprises are more sustainable
2. Agree what you are specifically being funded for

Some outcomes may be long term, but action may vary from year to year. It’s helpful to be clear about:
- what you will do for this funded period (even if in broad terms)
- any targets or milestones
- key outcomes that you will work towards (those within your control)
- what funding you require

You will use this as a basis for reporting later on. In Appendix one, we offer three examples for agreeing a funded work plan.

3. Make the links

It’s important to think through how activities and outcomes link to the long term strategic outcomes set by Government or funders. Below is a simple example of a logic model from a fictional children’s intermediary organisation.

Key to this is understanding who is changing or who benefits at different points. (Note that not all of these outcomes can be measured in practice, see page 12). See ESS guide to logic modelling
4. Agree a plan for measuring outcomes

A monitoring and evaluation plan should help with collecting evidence about planned activities and outcomes. The plan might include:

- Outcome indicators (what to measure to see if the outcome is happening)
- The evidence collection methods or tools to use
- How and when to capture baseline – the starting point
- When to collect evidence – and who will do it
- Where evidence or data will be stored (a database, a cupboard)

A template plan might look like this

| Outcome | Indicators (what outcome looks like) | How to collect evidence | When and who collect baseline | When and who collect ongoing data |

See **ESS guides on indicators and methods.**

5. Decide on when and how to report?

It’s normal to report to funders, members and others at least annually and usually every 6 months.

Most funders broadly want to see the same things in reports from funded organisations. In a nutshell “**what did you do?, what difference did you make (outcomes)? and what did you learn?**”. So these are good questions to ask when putting together an evaluation report.

An evaluation report can consist of parts of reports provided for another purpose or another funder. For example an intermediary might also produce reports for their board, an annual report or a report to another funder. A verbal update is sometimes sufficient.

See **ESS guide on reporting.**

See suggested template in appendix three.
Challenges for Intermediaries

Every organisation faces evaluation challenges. Here we outline some principles to tackle the particular challenges for intermediaries.

**Focus on evidence of outcomes within the control of the organisation**
Intermediaries can demonstrate outcomes in their sphere of control. It is much harder to demonstrate outcomes outside that sphere of control. For most intermediaries, most of the time the main difference they make is for the organisations and people they work with directly – that is their members and also others they work with directly such as policy-makers or funders. Intermediaries have less control over the outcomes that come from the work of those organisations or other people. It is often very difficult to collect direct evidence of outcomes for service users or communities.

**Focus on contribution not attribution**
Intermediaries don’t achieve long term outcomes alone. It can be tricky to attribute changes to any one organisation or intervention. Instead think about the particular role being played by an intermediary and how this fits with work that others are doing. Here are some quotes from intermediaries:

> A key challenge is how to evaluate policy influence when it is long term and difficult to attribute to one organisation. We don’t know how to evaluate except in terms of activity, for example, we can show we talked to a minister and that policy changed or is more supportive, but not that it was this discussion that made the difference.

> When you are in a policy area for a long time you can see the change/progress, but it can be hard to see that in the short term

> Policy work is a challenge, not least because the external factors are constantly changing

> Accept some important outcomes are hard to measure
Some outcomes are trickier to measure, but that doesn’t mean that they’re not important.

> It’s hard to measure how much we have raised the profile. We can say what we’ve done, but not what impact it has

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3 ESS and partners may do further work on evaluating particularly tough topics, like evaluating collaboration and policy influence
Accept evidence about what’s important to those involved. For example making connections and sharing are consistently valued by members.

**Accept ‘good enough’ evidence that works for all parties.** Sometimes different stakeholders want different evidence for different purposes. An intermediary organisation might have several funders and be accountable to their board and members. It’s helpful if the intermediary can find common ground and use a core set of outcomes and methods.

This doesn’t mean that funders can’t ask for extra evidence if it’s genuinely useful but it’s important to be clear that they shouldn’t keep asking for it or collecting it after the need has passed.

It can take a long time to build connections and you can’t predict what connections are going to lead to what”

In part what is good enough evaluation is determined by the type of activity and the relationship with the participant. For example, you would not ask someone to fill in a 5 page questionnaire after a 5 minute telephone enquiry.

Evaluation is also about improvement as well as accountability. E.g an after event questionnaire might ask if the event was well run, assess potential outcomes and provide an idea of next steps.

It is often helpful to have a mix of quantitative and qualitative evidence. It’s good to report quantitatively on activities and who is being reached, but you may need softer evidence of some outcomes. Sample and case study evidence can illustrate the changes being made.

Membership capacity can affect response rates, but even if the sample is not entirely representative it can offer detailed insight and powerful case studies.

**Be flexible and outcome focussed**
Many intermediary organisations work in an evolving landscape, they often perform best when they are agile and quick to respond to opportunities and threats. There is merit in focussing on strategic outcomes, rather than the minutia of delivery (e.g. x many events, attended by many people). Think carefully about the targets you set and ensure they don’t become more important than the outcome. Use evidence as a starting point for discussing what’s working and what isn’t.

How can you show that you’ve built a movement, especially since this involves working in collaboration and you can’t/don’t want to attribute to individual organisations?

Measurement where does it all go? Just because it might be handy [at some point] for parliamentary questions, that’s not a good enough reason to ask for information on a regular basis. You can phone up for that. Scottish Government official

Scottish Government official

 Scottish Government official
Section six: Discussion points for agreeing outcomes, activities and measurement

What are you trying to achieve and with or for whom?

What’s the need/problem you are trying to address?
What outcomes do you want to achieve (is it about increased understanding of needs, improving policy or organisational capacity or practice or collaboration or something else?)
For which groups or issues? Who needs to change/ be heard? (is it members, service users, third sector providers, policy makers, other providers?)

“The third sector is vast in terms of opinions, is it a mediated view, is it the voice of lived experience, is it the view or providers? You need to be careful what you are asking.” Scottish Government official

Who else is involved and in what way?

Which intermediaries are involved with that group or issue?
What roles and functions do you/they adopt?
Which other policy areas might also be affected/involved?
Who is best placed to help us to deliver our outcomes?

What will you measure and report back on?

What are you going to do to achieve your outcomes?

Who are you going to target?
What activities will you do?
When and how many?
How much will it cost?

Helpful example resources

In Appendix one, we offer three examples for agreeing a funded work plan.
In Appendix two we identify typical evaluation methods used by intermediaries
In Appendix three we attached an example template for reporting
Appendix one: examples for agreeing outcomes and activities

Part of ESS work plan as an example

Agreed work streams

- The Outcomes Approach: building capacity
- The Scottish Approach: understanding success
- Improving policy and practice: understanding and using evidence
- Reforming public services: sharing third sector learning and evidence.

Work stream 1: The Outcomes Approach – building capacity

Need for this work:
The outcomes-based approach encourages us all to focus on the difference that we make. The Government recognises the third sector’s important role in improving outcomes and that the sector offers specialist expertise and a flexible and innovative approach.
This means that the third sector needs skills and capacity to set, measure and report on outcomes. This is ESS’s core work and while some of it is funded by other funders, the TSU investment is essential to enable the smallest organisations to access support and to share learning widely about ‘what works’.

What will we do?
1. **Enquiries service**: Provide short evaluation support by email or telephone to at least 120 organisations.
2. **Website**: Maintain and update our website of evaluation resources and support guides; issue quarterly newsletter to our mailing list of over 2,000 people, and maintain our social media presence.

3. **Online evaluation resources**: targeted new work to review and add out our suite of support guides and workbooks so more organisations get basic help

Outcomes

*Generally for this strand:*

- Third sector has increased skills, knowledge and confidence on evaluating and reporting on outcomes.

### Annual cost

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Building capacity</th>
<th>Scottish Approach</th>
<th>Improving policy &amp; practice</th>
<th>Reforming public services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications officer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin Team</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office costs[^4]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[^4]: Detail costs for accommodation, printing, IT, staff training/board, travel
### Outcome 1: Policy makers, planners and commissioners will have a clear understanding of the contribution of the third sector to policy and delivery

<table>
<thead>
<tr>
<th>Planned activity</th>
<th>Planned action with progress to October 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Deliver a programme of co-produced events and seminars for policy makers, planners and commissioners.</td>
<td></td>
</tr>
<tr>
<td>We said we’d do</td>
<td></td>
</tr>
<tr>
<td>What we have done to date</td>
<td></td>
</tr>
<tr>
<td>What we’ll do next</td>
<td></td>
</tr>
<tr>
<td>Exception issues</td>
<td></td>
</tr>
<tr>
<td>☐ Form a steering group of all the partners, to plan and organise the programme. Two meetings of the steering group have taken place and a programme and dates for events and seminars have been agreed. November steering group will agree speakers and publicity.</td>
<td></td>
</tr>
<tr>
<td>☐ Book venues for all events ensuring a good coverage across Scotland Two thirds of venues have been booked It is proving difficult to book suitable venues in some areas, which may impact on travel distances for attendees. Booking of all venues will be completed by November.</td>
<td></td>
</tr>
<tr>
<td>1.2 [planned activity]</td>
<td></td>
</tr>
<tr>
<td>We said we’d do</td>
<td></td>
</tr>
<tr>
<td>What we have done to date</td>
<td></td>
</tr>
<tr>
<td>What we’ll do next</td>
<td></td>
</tr>
<tr>
<td>Exception issues</td>
<td></td>
</tr>
</tbody>
</table>

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**How will we measure the outcomes? [for example]**

- *We will conduct a survey of participants three months after the conclusion of the programme, to ascertain the change in policy makers, planners and commissioners understanding of the contribution of the third sector to policy and delivery.*
### Example grid identifying activities and outcomes related to strategic objectives

**STRATEGIC OBJECTIVE 1 – IMPROVE: Building Skills and Confidence for Excellent Leadership**

<table>
<thead>
<tr>
<th>Input</th>
<th>Action</th>
<th>Output</th>
<th>Outcome</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Develop and deliver a programme of learning opportunities that inspire excellence in leadership, good governance and recognise the needs, experience and diversity of the sector</td>
<td>Determine member needs through surveys, membership applications/renewals, horizon scanning, verbal feedback and post-event evaluations</td>
<td>Deliver a core event programme comprising a minimum of 40 events including 10 Leader Lunch Regional networks</td>
<td>Third sector leaders, member and non-member, have improved knowledge, skills and confidence to develop themselves and their organisations</td>
</tr>
<tr>
<td></td>
<td>Keep abreast of issues/challenges/developments impacting/likely to impact the sector through networking, attending external events and reading relevant publications and magazines</td>
<td>Create a calendar of events that reflect the needs of leaders in the sector focused across Scotland</td>
<td>Deliver a minimum of 5 project events</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Deliver an Annual Conference which reflects the needs of leaders in the sector</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Deliver a mentoring programme to increase the confidence and professional expertise of third sector leaders</td>
<td></td>
</tr>
</tbody>
</table>
## Appendix two: Evaluation methods

The table below gives some examples of the evaluation methods that intermediaries use to measure outcomes achieved from particular activities.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Methods to measure outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Websites</td>
<td>Web hits and downloads</td>
</tr>
<tr>
<td>Including resources and publications</td>
<td></td>
</tr>
<tr>
<td>Social media</td>
<td>Analytics</td>
</tr>
<tr>
<td>Newsletters</td>
<td>Number of newsletters and items opened</td>
</tr>
<tr>
<td>Workshops</td>
<td>End of workshop questionnaire and follow up</td>
</tr>
<tr>
<td>Events including network events</td>
<td>Event evaluation</td>
</tr>
<tr>
<td>One to one support</td>
<td>Note support given, any action agreed</td>
</tr>
<tr>
<td>Helpline</td>
<td>Monitor enquiries and support given</td>
</tr>
<tr>
<td>Mentoring and/or longer CPD</td>
<td>Measure against goals</td>
</tr>
<tr>
<td></td>
<td>More intensive self-assessment and re-assessment</td>
</tr>
<tr>
<td></td>
<td>Some CPD is accredited</td>
</tr>
<tr>
<td>Briefing papers and responses to</td>
<td>Tracking changes in policy</td>
</tr>
<tr>
<td>consultations</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td>Monitoring dissemination activities and follow up</td>
</tr>
</tbody>
</table>

In addition, intermediaries commonly use a **members’ survey** to assess the value and impact of their services overall.

Some use focus groups to sound out members and others to find out if needs are being met and views of what else is needed.

Some also collected informal feedback whilst working ‘in the field’.
## What we expected to do

**What goes here?**
A summary of what the organisation or project said they’d do (for example in an application form or at the start of the reporting period) including:

- Planned differences or changes that you want to make for the people you work with (outcomes).
- The main activities or services you provide to deliver your outcomes.

[this section could also include a reminder of the overall aim of the organisation or project to set the context]

## What we actually did

**What goes here?**
The main facts and figures about actual activities, for example the number of people the organisation or project worked with and the main things they did.

## What difference we actually made

**What goes here?**
Overall information about the outcomes achieved.
Could also include examples of how individual participants or service users experienced the projects (such as case studies or quotes).

## Challenges and changes

**What goes here?**
Any problems you encountered that slowed progress, stopped the outcomes happening or things that were changed.

## Learning for the future:

**What goes here?**
Unexpected outcomes (positive or negative).
Key learning points.
Anything they will do differently in the future.

## Other

For example – budget details