Evaluation Support Scotland

MAKING IT STICK

A guide to embedding evaluation

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About this guide

This guide is for people who have a role in making sure that evaluation is embedded into everyday practice within their organisation.

It will help you to think about why evaluation is important to your organisation and how to encourage staff, volunteers and trustees to embed evaluation into your organisation's day-to-day work. In practice, that might mean changing the way you design and do evaluation technically – if you need help with this, please visit the Evaluation Support Scotland website.

This guide is based on our work with hundreds of organisations over the years, some additional research we carried out, and specific learning from an Embedding Impact Practice group.

We use the words "evaluation" and "measuring impact" interchangeably. In both cases we mean assessing the difference you have made through your activities.

> *"You don't need to get a group of experts to do it for you; it's an everyday thing."*
>
> **Team member - Museums and Galleries Scotland**

Why embed?

Embedding evaluation is about putting impact at the heart of everything you do. It's about your entire organisation understanding the benefits of evaluation and impact, collecting useful data routinely, and using learning to plan, do, assess and review your work.

There are a number of reasons for embedding evaluation into everyday work:

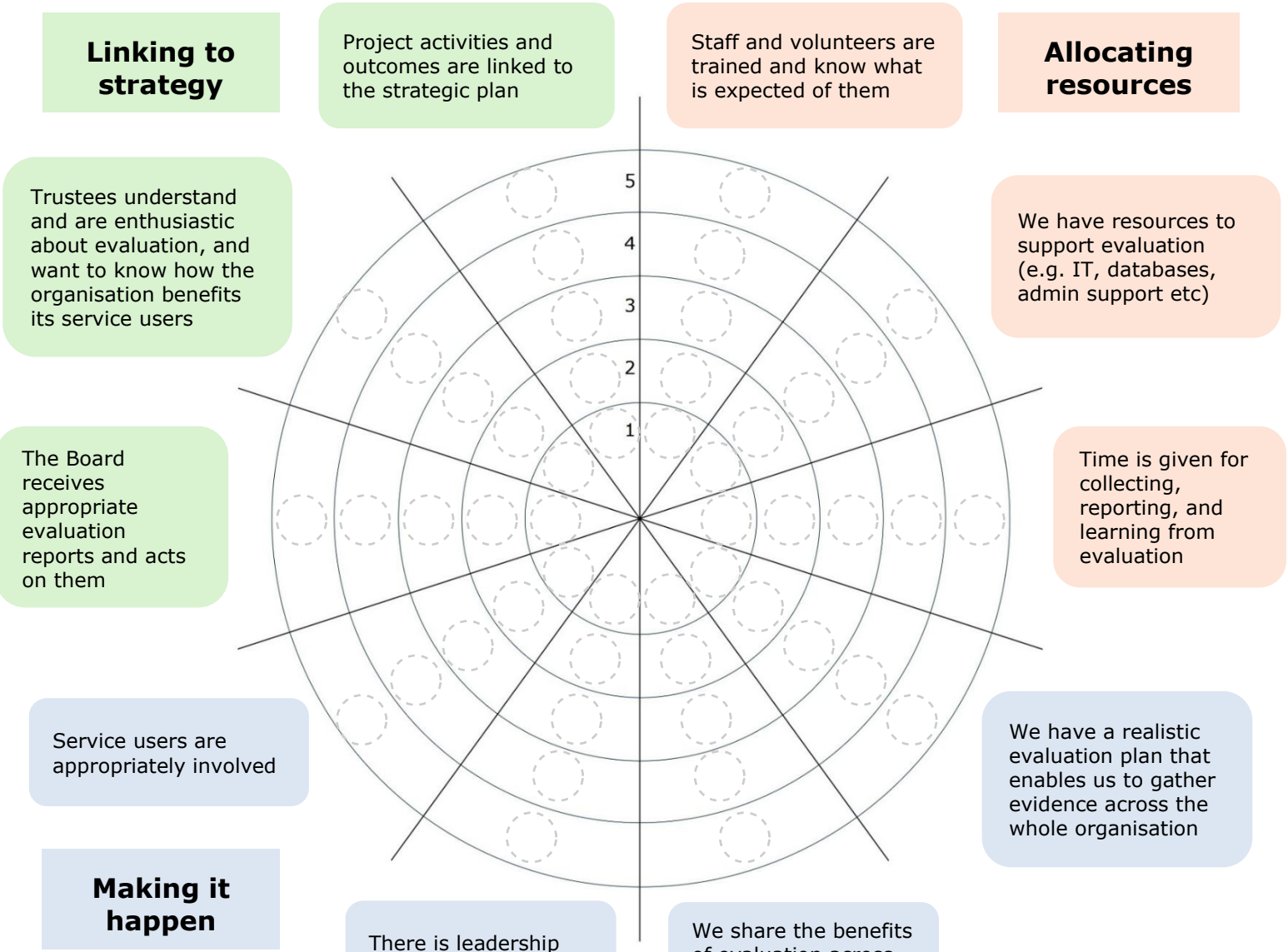
- Your organisation as a whole becomes more outcomes focused.
- Evidence collected is used for learning and improving services, not just for reporting to funders.
- Evaluation is built in, so you're not scrabbling around at the end of a project looking for evidence.
- You get better, more consistent data.
- You can make better use of the data you collect.
- Your evaluation is driven by a desire to learn, rather than by what you believe funders want.

Section one: Embedding evaluation into your organisation's practice

Our research showed that if you want to embed evaluation practice, you must:

- **Link to strategy** so your strategy is aligned to your evaluation plan, helping to ensure buy-in from senior managers and trustees.
- **Allocate resources to evaluation** giving staff and volunteers the time, training, support and other resources needed to do evaluation.
- **Make it happen in practice** by ensuring everyone is on board, understands why you are evaluating, and that your plan is practical and realistic.

Diagnostic Wheel



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How to use the wheel

The wheel can be used for personal reflection or to promote discussion.

Shade in the segments to reflect your view of where your organisation (or team) is on each element of embedding evaluation. This will allow you to consider which areas you could improve upon.

1 = poor and 5 = excellent.

If used for personal reflection:

You should be able to see at a glance where the strengths and weaknesses are. Go to **Section two** for ideas to improve your score.

Also think about how you can engage others in making changes. You can't do it alone! See **Section three** for our learning around when and how to plan change.

If used for group discussion:

To understand views across the group, ask everyone to fill in the wheel individually and then calculate the total score for each area. You can do this by gathering in the wheels or asking people to record their scores on a grid, perhaps on a flipchart or whiteboard (**see next page**). To see the extent to which opinions differ on each element, look for the highest and lowest scores.

From this, you should be able to see which areas are perceived to be stronger or weaker. You can also see where there is greatest divergence of opinion.

Then you can choose to discuss:

- The differences of opinion: Why does one person/group think your organisation is strong in a particular area and another that it's weak?
- The current situation in areas where you are collectively scoring high: Why you are so strong in that area? What is helping that to work so well?
- The current situation in areas where you are collectively scoring low: What's not working well? What can you do together to make it better?

Section two provides questions and ideas to think about for **improving** each area.

You may want to prioritise actions and plan who does what and when. **Section three** provides tools to help you to do this.

Example scoring table

Statement	Individual scores	Average	Lowest	Highest
Linking evaluation to strategy				
Project activities and outcomes are linked to our strategic plan				
Our trustees are enthusiastic about evaluation, and want to know how the organisation benefits its service users				
The board receive appropriate evaluation reports and act on them				
Resourcing evaluation				
All our staff are trained in evaluation and know what is expected of them				
Time is given for collecting, reporting, and learning from evaluation				
We have resources to support evaluation (e.g. IT, databases or other storage systems, admin support)				
Making it happen in practice				
There is leadership for evaluation				
We have a realistic evaluation plan that enables staff to gather evidence across the whole organisation				
We see the benefits of evaluation and share them across the organisation				
Service users are appropriately involved				

Section two: Things to think about

We will now cover each section of the Diagnostic Wheel in turn and suggest some questions and ideas to help you plan how to embed evaluation in your organisation.

Linking to strategy

Embedding evaluation requires organisational change and that means substantial commitment, leadership and buy-in at all levels.

Trustees and senior staff don't have to be involved with the detailed day-to-day planning and evaluation of each project or service, but they need to know where project outcomes fit into the broader organisational picture.

It's helpful if your organisational strategy and evaluation plan are aligned. It's also helpful for the board and senior staff to understand how the impact of different strands of work contributes to the organisation's vision and charitable purpose.

Questions
• Are you using the same words in individual staff plans as in your strategic plan? • Do you evaluate your strategic plan? • Does the board know the main outcomes for the organisation and what kinds of evidence you are collecting? • Does the board have discussions about impact at board meetings? • Do the board and senior staff ask for impact evidence and use it? • Do you report to the board about progress on evaluation?
Ideas
• Review your activities and outcomes whenever you discuss the strategic plan. This will help the board make decisions about any shifts in emphasis. • Ask the board or senior managers to identify some broad long-term outcomes for your client group or community. Map out how particular projects or services contribute to those services. • Keep the board informed by: creating a sub-committee / occasionally presenting project findings and learning / producing an annual evaluation report (which feeds into your annual report). • Ask the board and senior staff what evidence of impact would be useful for policy influence or for making strategic decisions about resources and improving services.

Allocating resources

Collecting outcome evidence takes time and effort, even when it fits into everyday work. Staff and volunteers need to know what to collect, when, and why. They need the skills and appropriate resources, not only to collect evidence of impact but also to record it.

It's also important that time is given for analysing data and reflecting upon what it means. Evaluation is for everyone; it's not just for reporting to funders, it's also about improving services at all levels of the organisation.

Questions
• Do your staff know the language of evaluation ('activities', 'outcomes', 'indicators')? • Do your staff know what information they need to collect, when, and why? • Are you clear about who is going to analyse and report on outcome information? • Does everyone have the skills to do their part? • Who can answer questions about systems if staff or volunteers get stuck? • Do you give staff and volunteers sufficient time to record evidence of impact? • Do staff have easy ways to record evidence of impact (paperwork, database, shared files, etc.) • Do you build in time to reflect as a team on the information you are collecting?
Ideas
Training and ongoing support • Include evaluation in induction for new staff. • Make it part of someone's role to check that systems are being used as intended, answer queries, give additional support or sort out issues. This could be a manager or evaluation champion. • Consider joining our Evaluation Leaders' Network • Refer staff and volunteers (where appropriate) to our support guides, resources and workshops. • Speak to other organisations about how they have embedded evaluation.

Making time

- Build reflection into each delivery session with staff or beneficiaries.
- Have evaluation as a standing item in team meetings.
- Include evaluation in all staff paperwork including staff support and supervision/appraisal.
- Routinely build time for evaluation into funding bids and project plans.

Making it happen in practice

For evaluation to become embedded, staff not only need to understand evaluation and have the resources they need, they also need to be motivated. A number of factors can affect their motivation:

- Ensuring your outcomes, indicators and methods make sense to staff, volunteers and service users.
- Having easy to use, practical systems that fit into everyday work.
- Knowing that evidence of impact that they collect will be used.
- Finding evaluation useful for their own purposes.
- Knowing that evaluation is important and its benefits are recognised.

A sense of the importance of evaluation needs to be reflected in the organisational culture. Leadership for evaluation should be encouraged at all levels. Involving people in developing evaluation plans can be critical to achieving that.

Questions

- Are staff and volunteers clear about your outcomes (the difference you hope to make) and how they fit into the organisation's work overall?
- Do they know what outcome indicators to measure?
- Do methods for collecting and using information work for everyone?
- What do staff and volunteers think about evaluation in your organisation?
- How do you involve staff, volunteers and service users in planning for and using evaluation information?
- How do you share and use evaluation evidence?

Ideas

Create a sense of ownership

- Involve the whole team in discussions around evaluation. Start with your vision and mission. Why do we work here? What gets us out of bed in the morning? Evaluation is about what matters.
- Ask staff to think about why evaluation is important, for whom and what gets in the way. Take any concerns seriously.
- Involve teams in setting outcomes and indicators. Ask for ideas for how they could collect more or better information about outcomes and what matters. Involve them in making sense of the evidence and reflecting on both the method for collecting information and the findings.

Make sure your plan is realistic

- Evaluation is never perfect – go for 'good enough'. Keep it simple; don't have too many outcomes or indicators. Concentrate on indicators that are most important / relevant / easy to measure.
- You don't need to evaluate everything all the time.
- Make the method fit the context (e.g. when on the move, use a notebook, tablet or phone; if short on time, develop quick and easy methods such as a show of hands).
- Make use of information you already have or use existing data collection points (e.g. referral, assessment, and review paperwork).
- Regularly review your plan to ensure it's still fit for purpose.

Communicate results and show how you have used them

- Share good stories internally e.g.: "I was with the Minister, and it was great to be able to provide evidence of the difference we make." or "We used evaluation to get more funding."
- Provide feedback to service users.
- Put feedback on a wall so everyone can read it.
- Report to your board and ask for feedback.
- Showcase your impact in your annual report and on your website.

Involve service users (the people you work with)

- Ask your service users for ideas about how they could collect more or better information about outcomes and what matters to them.
- Don't impose evaluation methods on them. Test methods with a small sample and ask how was it for them.
- Sense-check analysis results with service users.
- Make evaluation fun and relevant.

Section three: Action planning

This section sets out what we have learned about how to plan change and includes an action planning template.

Leadership is important

Leadership is important for creating the right culture for evaluation. If you are thinking about embedding evaluation practice, you need to think about who is leading this process and with what authority. You also need to think about how you are going to involve people at all levels of the organisation.

Involving frontline staff is helpful

Involving frontline staff helps to bring them on board and become more willing to use any new systems. It also helps you improve those systems because the everyday realities of the work are taken into account. Staff can share their understanding of what outcomes look like in practice.

> "This has given me a greater understanding of what VSS are trying to achieve with regards to their outcomes. It also confirmed to me that what we were doing previously wasn't working and it wasn't that I just wasn't getting it!"
>
> **Member of champions group from Victim Support Scotland**

Creating an evaluation champions group (including frontline staff) to direct changes can be powerful. The group can collectively complete the diagnostic wheel (**see page 5**), agree priorities for action, and test out new approaches with other staff, volunteers and service users.

It takes time

Embedding evaluation practice can be a complex process that requires changes in attitudes and the way people work together, as well as in evidence collection and reporting systems. That takes time, not least because it requires buy-in at different levels of the organisation. It's helpful to accept that you can't change everything all at once, and to break your actions down into smaller steps that you can address over time.

"Embedding impact practice takes time and lots of patience; knowing where change and improvement can be made, but you have to give yourself time to get there."

Embedding Impact Practice Learning Exchange session

Pilot and review your changes

Not everything is going to work the first time, so be ready to change your approach and try something different. This means taking a 'no blame' approach and encouraging people that **learning**, not perfection, is the most important thing.

"Embedding impact practice and evaluation is about always looking at what you are doing. It's a cycle you should be on all the time."

Member of embedding impact practice group from Circle

Each organisation is different

Each organisation faces different challenges because of the work it does, the size of the organisation and the people within it.

There is no one right way to go about making change and embedding evaluation.

"Smaller organisations can lack resources to dedicate to… evaluation work and larger organisations with complex service provision can take time to respond to changes in direction."

Children First

It’s important to get the timing right

It’s not helpful to start this process when other big changes are happening; for example, during a staff restructuring. It can help to think about reviewing your evaluation at the same time you are reviewing your strategic plan. It helps to ensure that similar language is used and that outcomes and activities are reviewed considering your strategic vision.

Rather than being led by what technology is available, we suggest you develop your evaluation plan and paperwork before you start designing or changing your database / storage system.

Creating your plan for change

Here is a template for you to start planning how to embed evaluation more firmly in your organisational culture.

Who is going to lead on this work?	
Who else needs to be involved and how? (frontline workers, service users, managers, senior managers, the board)	
When will we start the work? (What else is going on in the organisation that we need to be aware of?)	
What resources will we need?	
What possible actions have we identified through this guide?	
What are our initial priorities? Are there any quick wins?	
When will we review our actions?	

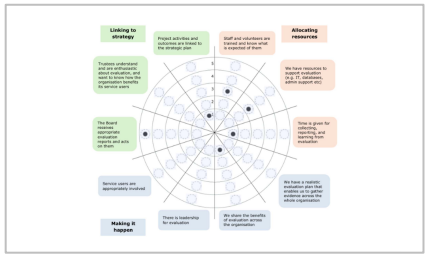
Section four: Embedding Evaluation Checklist

This Checklist is similar to the **Diagnostic Wheel**, but asks some more detailed, practical questions. It is designed to stimulate discussion with staff at all levels, whereas the wheel requires respondents to have an understanding of how the board and senior management view evaluation.

Does everyone who should be involved (staff and/or volunteers)**...**	I've no idea	No, definitely not!	To some extent	Yes, absolutely!
... know the language of evaluation (activities, outcomes, indicators)?	○	○	○	○
... get included in creating evaluation plans?	○	○	○	○
... understand the outcomes set for their work and how this fits with the aims of the wider organisation?	○	○	○	○
... know what information they need to collect, when and why?	○	○	○	○
... know who is responsible for analysing and reporting on outcome information?	○	○	○	○
... have the skills to do their part?	○	○	○	○
... know who to ask about evaluation systems if they get stuck (eg their manager / the organisation's evaluation leader)?	○	○	○	○
... have sufficient time to record evaluation information (eg by building reflection time into each delivery session)?	○	○	○	○
... have easy ways to record the difference they are making?	○	○	○	○
... have time to reflect with the team on what the evidence means?	○	○	○	○
... receive appropriate information about evaluation at induction?	○	○	○	○
... know that there is further evaluation support from ESS (eg free support guides, workshops, evaluation leaders network etc)?	○	○	○	○

Does your organisation…	I've no idea	No, definitely not!	To some extent	Yes, absolutely!
… understand the value of evaluation?	○	○	○	○
… have proportionate evaluation plans in place?	○	○	○	○
… have evaluation as a standing item in team meetings?	○	○	○	○
… include evaluation in staff paperwork (eg support and supervision / appraisal templates)?	○	○	○	○
… routinely build time for evaluation into project plans and funding applications?	○	○	○	○
… use what it learns from evaluation to celebrate?	○	○	○	○
… use what it learns from evaluation to improve?	○	○	○	○
… share what it learns with other organisations so they don't have to reinvent the wheel?	○	○	○	○

Section five: Other resources

Evaluation Support Scotland resources	
	Why bother involving people in evaluation? Beyond feedback - workbook
	Helping you share your learning - workbook
	Editable evaluation wheel

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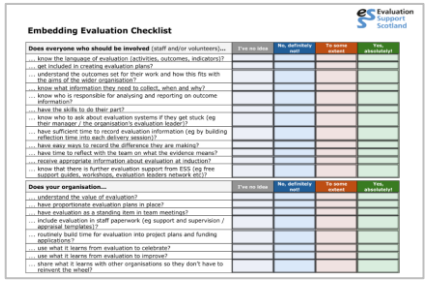	Embedding evaluation checklist
	Victim support case study
	Full library of Evaluation Support Scotland resources

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Inspiring Impact case studies	
	Children 1st case study: Breaking static impact practice
	Macrobert Arts Centre case study: A new collaborative way of working
	A good practice case study report: What good impact measurement looks like

	Inspiring Impact Scotland case study: Circle - Embracing change

Evaluation Support Scotland works with organisations so that they can measure and explain their impact.

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Inspiring Impact was a UK-wide collaborative programme that ran from 2011 to 2022. It worked with the charity sector to support good impact practice. Evaluation Support Scotland led the programme in Scotland. The final few years were focused on working with organisations to embed evaluation practice, and to share their learning about doing so.

www.thinknpc.org/resource-hub/the-inspiring-impact-programme

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