

# ACTIVITIES & IMPACT REPORT

2018/19



Plan to evaluate – Evaluate to plan



## PLAN TO EVALUATE – EVALUATE TO PLAN

Planning to evaluate is key to successful evaluation. We support third sector organisations to evaluate their work to show the difference they make and to improve their services. Evaluation often leads to planning better services and so the cycle begins again!

This year we have been planning our future; producing our strategic plan 2019 -2023. We spent time consulting our stakeholders, ESS staff and trustees through a consultation survey and in-depth interviews, away days and meetings. Our new plan is about continuing our 'core work' at the same time as developing new workshops, resources, and ways of supporting third sector organisations to start or continue their evaluation journeys. We will also look for opportunities to work with others, such as improvement agencies and third sector intermediaries, to share learning from, and about, evaluation and so influence the system in which third sector organisations work. We're keen to hear from those who'd like to work with us.

In this report we showcase examples of our support to third sector organisations and funders with a focus on planning for evaluation.

Enjoy reading about our work this year. Please get in touch with any feedback.

Thank you,

**Steven Marwick**  
Director



## Our money

**Income £361,523**

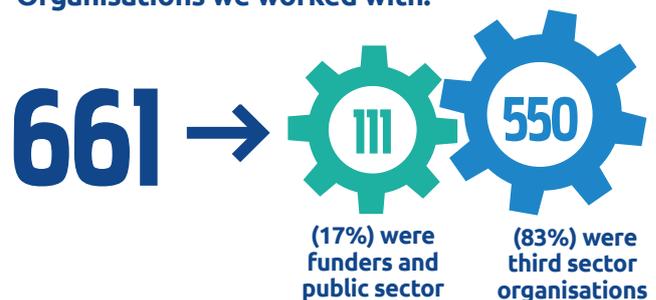
**Expenditure £393,774**

We received grants from the Scottish Government and NPC. The rest of our income comes from contracts and fees. The financial statements show a deficit this year because we undertook activities in 2018/19 using grant income received in advance in 2017/18. Taking this into account we made a small surplus.

[Our full Annual Report and Financial Statement 2018/2019 is on our website.](#)

## Overview of activities in 2018/19

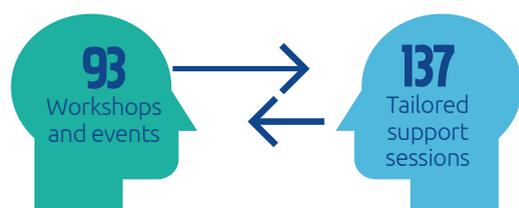
Organisations we worked with:



People we worked with:



We delivered:

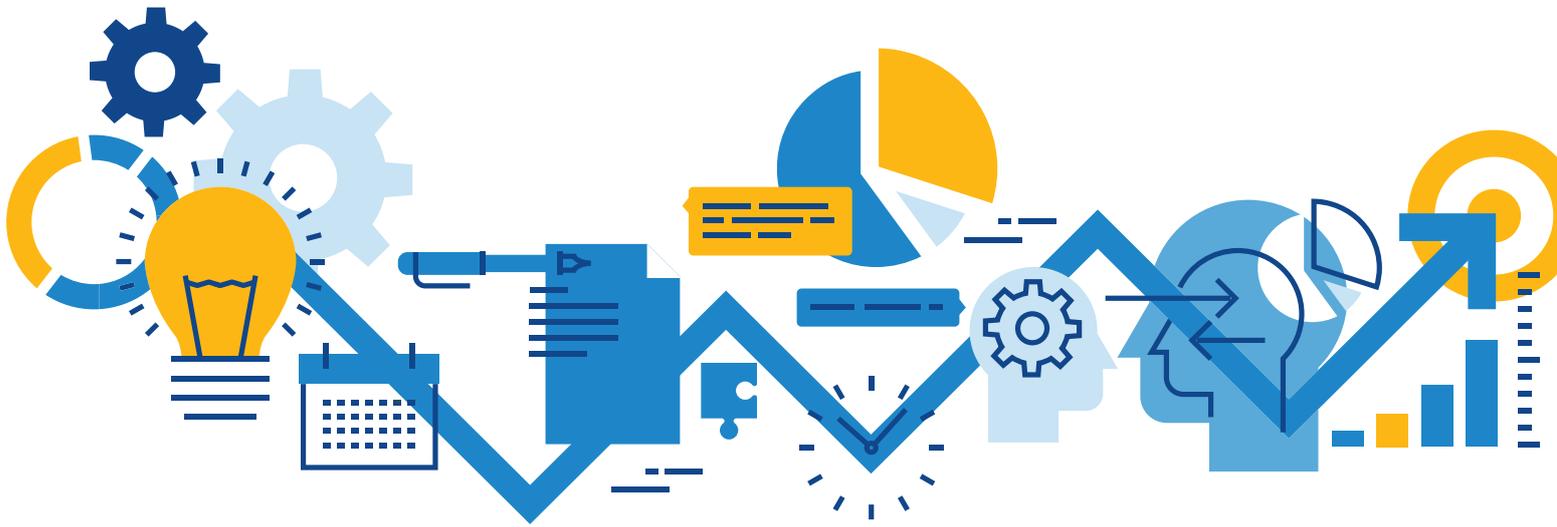


In this year we worked in every local authority except Orkney.



We convene the Third Sector Research Forum and Knowledge Translation Network.





## Our impact

*“ESS is good at helping people understand expert approaches to evaluation, breaking through the myths and jargon. Good at helping people understand and plan how to do evaluation as part of ongoing work. Supportive and friendly approach. Excellent understanding of the challenges of the sector and therefore our evaluation support needs.”*

### **TSO respondent to consultation survey**

*“We created new evaluation tools which are much more user friendly, we are able to use this at the beginning and end of the programme. This makes it easier for us to evaluate the impact we are making.”* **Laura Yetton, Kilmarnock Station Heritage Railway Trust**

### **Key findings from our 2018 Stakeholder Consultation (online survey and interviews):**

We are **helpful, supportive, useful, informative, relevant** (Top 5 words used to describe ESS)



people **would** refer others to us



**had** referred others to us

## We do well:

*“Overall everything is just very appealing, inviting and digestible - there is a great consistency in this approach from individual method sheets to the feel of a big event”*

### **Third Sector Organisation (TSO)**

*“ESS takes complicated things and makes them clear; runs high quality events and produces useful quality resources for the sector. We think you do pretty much everything well!”* **TSO**

*“ESS is brilliant at collaborating and working in partnership with organisations to share and promote learning and new ways of evaluating”* **TSO**

*“The resources available are really useful, and the newsletter is great”* **TSO**

*“Particularly value the Inspiring Impact network events”*

### **Non third sector organisation**

*“We have used the workshops and telephone advice and both worked very well. Staff were incredibly knowledgeable and with a willingness to help”* **TSO**

## We could do better:

*“More tailored support e.g. for hard to measure activities such as arts and culture”* **TSO**

*“More peer-to-peer learning sessions”* **TSO**

Our resources could be improved by being briefer:

*“I need your website to lean toward having bite sized and standalone content and away from long handbooks or copies of slides”* **TSO**

# PLANNING TO EVALUATE

The mainstay of our evaluation support is our 'Let's evaluate!' workshops, tailored support and online resources.

Our support helps third sector organisations to plan to evaluate, and those with more evaluation experience are helped to use their learning to influence policy and improve services.



For the more experienced we delivered 'Theory of change: An introduction to Logic Modelling' workshop, and for funders, 'Getting the best from your grantholders'.

*"Concise but not overwhelming. Informative but not mind boggling. Welcoming with assurance of support if needed."* **Debbie Kirkness, Music 4 U**

*"Great pace, materials, learning opportunities. Facilitator was full of knowledge, really helped to understand subject. Left feeling capable and enabled to start working, on evaluating our service and organisation."* **Angela Norrie, Moray Sports Centre**

*"More enjoyable than anticipated! Good structure and pace. Good time to think about current practice. Reassuring to think about what I do well and food for thought about how to improve."* **Jen Novotny, Scottish Civic Trust**

## Workshops

We delivered:



22 'Let's evaluate!' workshops



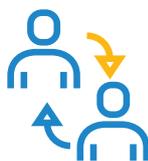
in Aberdeen, Edinburgh, Glasgow, Inverness and Perth



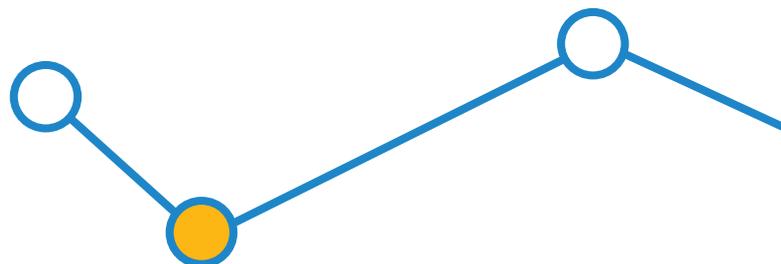
23 workshops commissioned by an organisation



321 participants attended



from 111 organisations



# Our impact

"We went from not good to good thanks to ESS training and support." **respondent to consultation survey**

"I didn't know much about everything at the start of today, and now feel quite confident." **Jonathan Roy, Morton in the Community**

Well over 90% of workshop participants reported improvements in evaluation skills. Specifically, 19% said they planned to use their learning for planning/improving.

**Tomintoul & Glenlivet Development Trust** said they were going "To write an evaluation plan for my project. Try a different method out at our next event."

Three months after the workshop 90% of participants had actioned their learning (based on 46 participants' feedback):

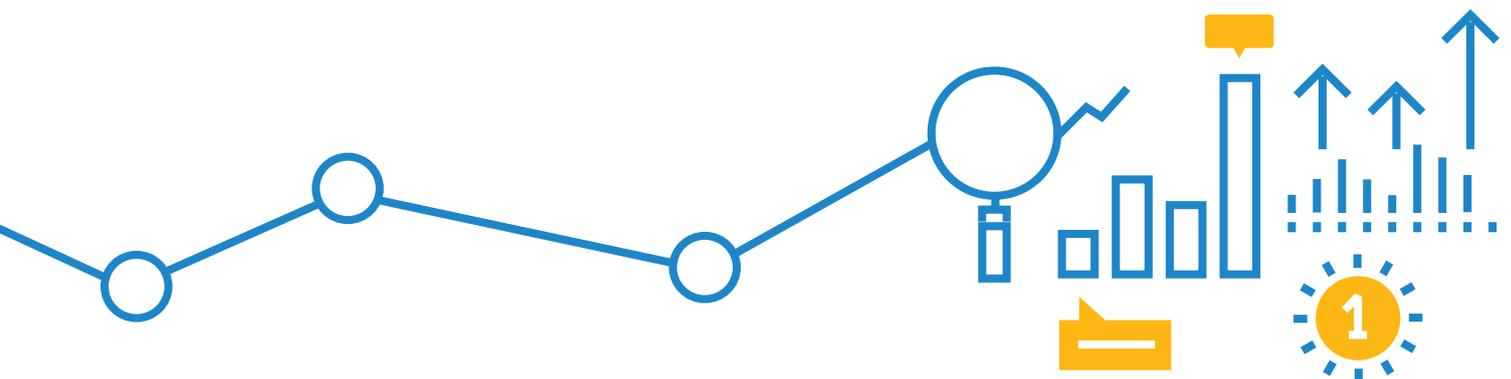


"Following the sessions, I organised a staff meeting whereby we worked as a team to identify outcomes and indicators for each of the activities we run for children. This allowed us to update our evaluation forms to make this process easier for staff to complete. It has also helped our families identify which classes are appropriate for their child to attend, based on which outcomes they wish to target." **Teri Turnball, Perth Autism Support**

"It's starting to have an impact. Sharing the learning across the organisation so all managers are aware of the range of tools. More confidence in asking questions to better articulate the learning from our projects." **Susan Mitchell, One Parent Families Scotland**

# Our learning

- ⚙️ Participants respond well to the workshop learning style. However, we will explore how to tailor commissioned workshops even more to the organisation.
- ⚙️ There is demand for 'Let's Evaluate!' workshops outside the central belt of Scotland. We need to find ways to publicise these more.



# TAILORED SUPPORT

We delivered **42 tailored support sessions to 24 organisations**. The result was that organisations created a theory of change, set outcomes and indicators, devised evaluation plans or designed methods.

The following case studies are of third sector organisations and funders who received varying amounts of tailored support to meet their individual evaluation needs. They show the range of evaluation challenges we support organisations to overcome.



## Evaluating a partnership

We delivered a one-day tailored support session to the Making Recovery Real Partnership (MRRP) which was organised by TSI Moray and comprises third and statutory sector members. The session helped members gain the skills to evaluate the partnership by creating an evaluation framework and an outcomes-based approach to funding future projects.

## Our impact

Feedback from participants on the day showed that the session helped to:

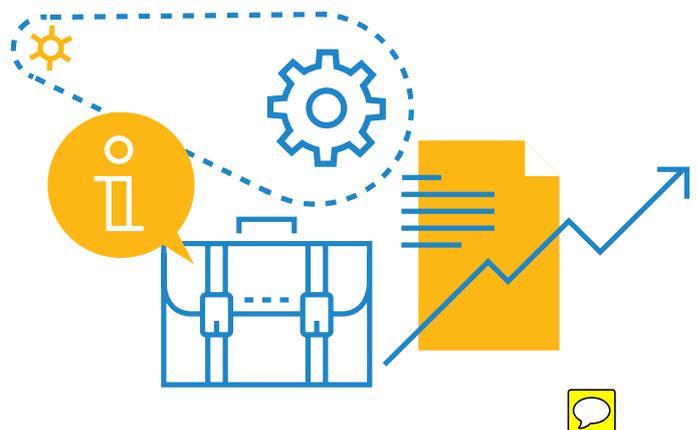
- Develop participants' own understanding and knowledge of evaluation
- Renew a sense of purpose and enthusiasm for the partnership.

*"It was a super event and I still feel on a high – we really got a lot of work done and this will bring us good explicit outcome reporting and celebration."* **Pamela Cremin, Mental Health, Health and Social Care Moray**

*"Getting a chance to share ideas and give time to work together and think about why we do what we do and why it's worth investing in."* **Louise Parkinson, Penumbra**

## Our learning

- It is valuable to encourage partnerships to think about what difference they make collaboratively rather than worrying too much about individual attribution.
- By setting shared outcomes the partnership also identified ways to measure the difference they made to each other. If they hadn't planned to evaluate together, this may not have been identified.



[See full version of this case study on our website](#)

## Evaluation planning in a funder

The Short Breaks Fund (SBF) provides grants to third sector organisations that support unpaid carers to take a break from their caring role. Shared Care Scotland engaged ESS to help revisit their vision and develop a shared understanding of the outcomes and activities of the Fund and to create an evaluation framework.

### Our impact

*“Those involved with the Short Breaks Fund now have a better understanding of the need for the fund and what the outcomes and key activity areas for the fund are.”*

We have *“a clearer communications strategy for both internal and external stakeholders and already we’ve seen an uplift in enquiries from new potential applicants to our recently launched Creative Breaks Fund.”*

**Alison Brown, Short Breaks Fund Manager**

### Our learning

- It’s valuable to bring people from a range of roles together. People from funded projects and Scottish Government took part in the support alongside Shared Care Scotland staff.
- As an external facilitator, ESS gives space for organisations to think. We can challenge assumptions and support organisations to see with fresh eyes but still enable them to own their solutions.



[See full version of this case study on our website](#)

## Evaluating public engagement



Public engagement staff from the School of Life Sciences at University of Dundee wanted to develop methods to evaluate and show the impact of their diverse range of their public engagement activities.

### What ESS did

During 3 sessions of tailored support, the public engagement team:

- Developed a logic model, indicators and methods for their public engagement activities
- Analysed some of their data to identify learning for their public engagement process.

### Our impact

The team wrote a publication ‘[Our evaluation story](#)’ which tells the story of the team’s journey of developing a monitoring and evaluation plan.

*“The moral of the story is that coming up with an evaluation strategy really helps you figure out what is valuable in what you do and focus your efforts on doing it even better. It takes time and a lot of thought to do properly, but it’s a very useful process that everyone should undertake!”* **Our evaluation story**

### Our learning

- Public engagement is an expanding area of work for universities and a new area of evaluation support for ESS. Focusing on ‘who you are working with’ and ‘what you are trying to achieve’ enabled the team to identify more realistic outcomes for the people they worked directly with.

[See full version of this case study on our website](#)

# NEW THIS YEAR – WORKSHOPS AND RESOURCES

## ‘Not just a story’ workshop



Building on previous work with the Corra Foundation’s Partnership Drugs Initiative (PDI), we piloted a workshop to skill up people to use storytelling as a method of evaluation; to make better use of the rich information heard every day from people who use services or support.

The workshop was delivered for PDI projects and community-based projects in Perth and Kinross. Using feedback from each workshop, we improved and tested out changes to workshop content.

Participants increased their understanding about how qualitative feedback is used to monitor and evaluate, the difference between case studies and experiences, and how to collect and analyse people’s experiences.

**They said:** *“I have learned loads today, specifically around creatively working with young people to use their stories and help them feel heard and valued.”*

*“Framework for analysing stories really useful.”*

**This workshop is now in our 2019/20 programme.**

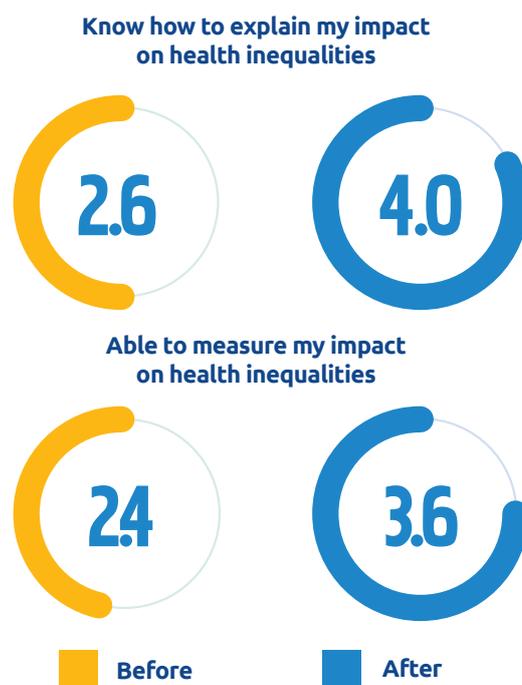
## Demonstrating health inequalities

The National Learning Collaborative on Inequalities, co-ordinated by NHS Health Scotland, commissioned Evaluation Support Scotland (ESS) and the Community Health Exchange (CHEX) to run workshops to build understanding across the third sector and public sector on the causes of inequalities and how to evaluate work to tackle inequalities.

We trained 67 participants in the ‘Five Steps to Evaluate Health Inequalities’, developed through our 2018 scoping study. The workshop enabled projects to think through realistic ways of evaluating prevention work.

*“Turned on lots of lightbulb moments and clear ways of working forward”* **Health and Social Care Alliance Scotland (the ALLIANCE).**

Average before and after scores from all participants is shown below.



*“Use logic models to plan their work”* was by far the most popular action workshop participants said they would take after the session.



# LEARNING AND NETWORKING EVENTS

**Inspiring Impact is a UK-wide collaborative programme. ESS delivers the programme in Scotland and our focus is peer learning.**

## This year we have

- ⚙️ Run 3 events for participants from 40 organisations:
  - 'Sharing news from your evaluation'
  - 'Sharing tools for evaluation'
  - 'Making the most of reporting'
- ⚙️ Shared learning through #impactchats on Twitter
- ⚙️ Produced case studies from Volunteer Edinburgh and Changeworks

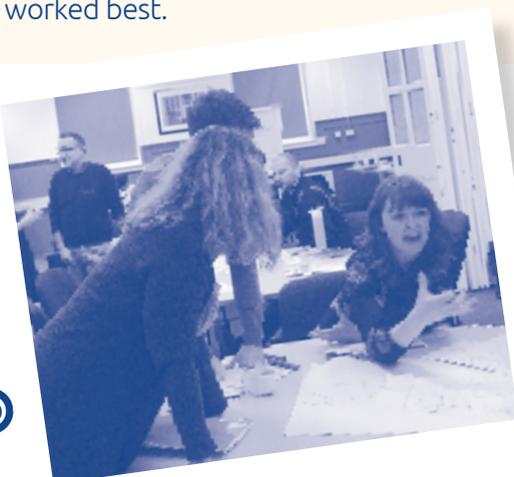
## What participants liked about Inspiring Impact events

*"Networking; observing evaluation tools; sound board section; having a mix of participants i.e. funders, 3rd sector, front line, managers."* **Nadeem Ishaque, Minority Communities Addictions Support Service**

Following 'Making the most of reporting' **Lorna Bryson, Cyrenians** said she was going to *"Plan better. Think about data gathering who does it, who can do it, when should we do it."*

## Our learning

- ⚙️ In response to feedback from previous years, we introduced action learning exercises. We trialed three different ways and concluded that having an exercise to solve anonymous 'problems' worked best.



## 'Evidence for what?' Roundtable event

We convened a roundtable event for people from different sectors: 'Evidence for what? Lessons from the third sector' to discuss issues about whose evidence, whose outcomes, and who decides what's good enough. Participants told us they valued unpacking assumptions and learning from each other. Our roundtable report was used by What Works Scotland.

## 'Stats and stories'

As a result of the 'Evidence for what?' roundtable, we developed a resource – 'Stats and stories in community settings: a guide to blending different types of evidence'. This was tested out by 8 third sector participants at an event.

### A participant said they were taking away from the event:

*"The importance of blending stats and stories so that they support and illustrate each other and give a clearer picture of impact."* **Caroline Libberton, Fathers Network Scotland**

**Claire Williams, Citizens Advice Scotland** summarised what was good about the resource and event

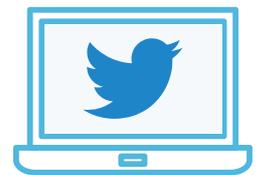
*"Progression of the guide - starting with understanding of concept through to examples. Valuable to be able to get feedback on my own report and see examples of others from different charities"*

## 'How's it going'

We ran a session attended by 5 organisations funded by The National Lottery Community Fund, who had received evaluation support from ESS to share their success and challenges about evaluating their funded projects. Participants said the session helped to reassure and encourage them with evaluation, as well as being able to do some specific troubleshooting.

They created key messages for other grant holders which we have shared widely.

*"Great messages from grant holders to others going through the process about how they are approaching evaluation"* **Tweeted by The National Lottery Community Fund**



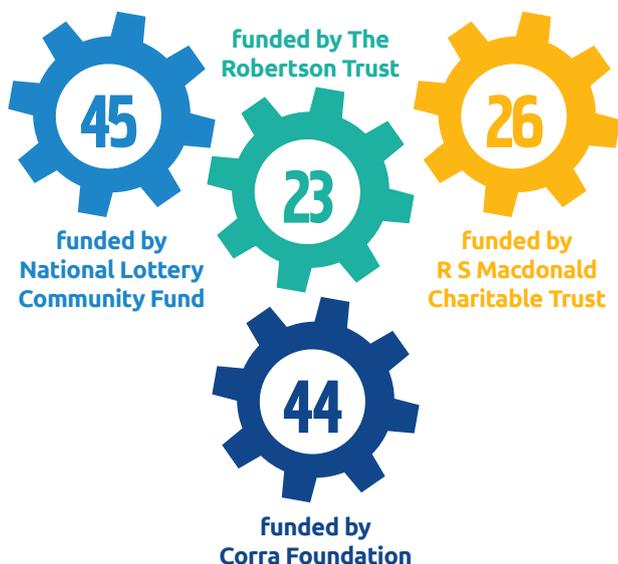
# EVALUATION SUPPORT ACCOUNTS

**Evaluation Support Accounts (ESA) enable us to deliver a support package to third sector organisations paid for by their funder.**

Organisations can access some or all of 'Let's evaluate!' workshops, tailored support, workbooks, webinars and peer learning events.

# 148

organisations benefitted from free support through an ESA



We also provided tailored support sessions funded by Paul Hamlyn Foundation, and workshops funded by Historic Environment Scotland, Go for it, and the Self-Management Fund.

*"The workshop and the others attended by my team have been invaluable in getting us to refocus on our outcomes and self-evaluations. We have implemented many of the ideas generated by both the workshop leader and the other participants. Would highly recommend them to other organisations, even if you think you know, there is always something to learn, change and improve on."* **Angela Ferguson, Perth Autism Support**

## Our impact

### Improved evaluation skills

All organisations funded by Corra reported improvements in evaluation skills. On average participants moved from a 2.5 baseline score to 4.5 after the workshop.

**Before 'Make to measure' workshop, Alan Cameron from Stand Easy said** *"We take our evaluations very seriously, but I have had no formal training in how to evaluate projects."*

**After the workshop he said** *"I thought this really opened out my thoughts on how to evaluate and how to add into the work itself."*

*"The creation of outcomes and indicators really helped us think about how much of our current evaluation was useful, and how we could improve on the surveys we are currently sending out to returned volunteers."*

**Louise Campbell** - after a tailored support session on outcomes with The Vine Trust funded by The Robertson Trust.

### Better evaluation systems

*"We already had a lengthy customer/client feedback form which we found in many cases to be too onerous at the end of a lengthy session so on your advice we simplified this and [...] have been able to use the results in our year-end figures to demonstrate the softer results."* **Christine Watt, Council on Disability Stirling**

**Time and Space** achieved their goal: to get better at knowing how to evidence outcomes. Since attending the workshops they have changed their outcomes *"so they are more relevant to what we actually do"*

**Elaine Weir**





## Shared learning

*"It was a really good workshop. It is interesting to hear other people's approaches and problems - would have liked more of this. Good to know issues are universal!"*

**Ruth Ogston, National Theatre of Scotland**

after attending 'Getting started' funded by RS Macdonald Charitable Trust.

### Organisations funded by RS Mcdonald Charitable Trust planned to:

*"Review and update outcomes for the organisation."*

Alison Adams, Learning Tree Partnership

*"Share my learning with the team and plan on using this to understand our own evaluation method - what could we do better? Will help shape better evidence and ultimately better funding applications."*

**Susan Rodger, Glasgow Caledonian University**

## Our learning

- ⚙ Through ESAs we can support a wider range of organisations including smaller ones that are newer to self-evaluation.
- ⚙ Not all referred organisations take up our offer of support. Funders think this may be due to limited capacity of organisations.

### The following is an example of the impact of our work with organisations funded through ESAs.



The Ecology Centre, funded initially by The Robertson Trust and then by National Lottery Community Fund, wanted ESS's support to develop evaluation plans and embed evaluation into their work *"in a way that adds value rather than derailing the good work which is already being done. It will be important to be sure there is a shared*

*understanding of what evaluation means and how to go about thinking about doing it."* **David Stockwell**

Three Ecology Centre staff received tailored support, and all staff and board members attended a one-day training session and went on to develop a logic model.

*"We have completely reviewed and revised our evaluation planning and methods for our educational work based on advice and guidance from ESS."*

*"Going through initial on-site workshops working on development independently via resources on your website, then taking these 3 workshops has completely solidified my ability to evaluate. Your services have been so valuable. That's not to say at times I haven't been overwhelmed or confused, but it's been completely worth it to push through, do the hard work, to get to this point."*



[See full version of this case study on our website](#)

# PLANNING TO MEASURE WHAT STRATEGICALLY MATTERS

In this section we highlight work from three programmes to support third sector organisations and funders to plan to measure what matters.

## Involving young people in evaluation

Funded by The National Lottery Community Fund (NLCF) we supported youth workers from 5 projects to test out different ways of [involving young people to lead on evaluation](#).

We produced 2 case studies from [Springhall & Whitlawburn Youth Development Team](#) and [Streets Ahead](#) and ran an event (with YouthLink Scotland, Youth Scotland and NLCF) for 48 young people, youth workers and funders where young people shared their experiences of shaping evaluation methods.

*"This project has greatly improved our capacity to gather valuable feedback from our service users through a fun interactive tool. We have improved tools and gained an awareness of how best to involve young people in our evaluation developments in the future!"* **Justine Porter, Streets Ahead, Hillcrest Futures**

### Our learning

- ⚙️ We need to build the confidence of youth workers to hand over the lead on evaluation to young people. The key message is to take a step by step approach and don't do everything at once!
- ⚙️ Young people told us evidence gathered through methods they'd designed was more robust and reliable.



## 'Threading the Needle' Fife

'[Threading the Needle](#)' (TTN) was a Scottish Government funded programme to support health and social care commissioners in 4 health and social care partnerships areas to use third sector evidence to commission outcomes for health and social care. Building on previous work, completed in 2017/18, we continued to work in Fife in 2018/19.

Over this year we have facilitated the Fife partners to summarise and share learning in 'Using third sector evidence in strategic commissioning – learning from Fife' and supported befriending services to identify 'Top tips for commissioners'.

The Fife Head of Strategic Planning, Performance and Commissioning commented publicly in 2019 that evolving/adapting the service level agreement led to better outcomes for all – in commissioning terms and the people of Fife.

Nationally, ESS participated in public health reform strategic work and contributed to a vision for Public Health Scotland in relation to research and evidence.

### Our learning

It takes time to get to a position where TSOs have useful evidence to share which can influence future strategic commissioning. They need to plan to evaluate before they can evaluate to plan.

# THIRD SECTOR INTERFACE OUTCOME FRAMEWORK

Commissioned by the Scottish  
Government Third Sector Unit we  
worked with third sector interfaces (TSI)  
to develop a new outcome framework.

The framework clarifies the roles and medium-term  
outcomes of TSIs.

We worked with the network to create further  
guidance on planning, reporting and measurement.

*"The new outcome framework does take TSIs away from  
the old task and numbers reporting and will enable us  
to demonstrate the huge difference we make at a local  
level."* **Ella Simpson, EVOC, in TFN article March 2019**

We will continue our support to TSIs next year.



## Our learning

⚙️ A key message is 'we are learning together,  
as we go'.

*"Appreciate the ongoing learning process of this  
planning - good to recognise that this is work in  
progress."* **Participant at TSI conference**

⚙️ We have stimulated joint planning.

*"It seems to have led to a new era of local  
coproduction"* **TFN article (references planning  
activity in the Forth Valley)**

*"Cultural change like that is like gold dust"*  
**Bill Clements, CVS Inverclyde**



# EVALUATING TO PLAN FOR THE FUTURE – ESS STRATEGIC PLAN

During this year we consulted our staff, trustees and stakeholders at different events, away days, meetings, and via an online survey and in-depth interviews.

We also drew from previous years' evaluation and learning. Using all this feedback, we created [our strategic plan for 2019 – 2023](#).

## We will continue

- ⚙️ Evaluation advice by email or phone
- ⚙️ Deliver 'Let's evaluate!' workshops
- ⚙️ Tailored support
- ⚙️ Evaluation Support Accounts (ESA)
- ⚙️ Free resources
- ⚙️ Share good practice and key messages
- ⚙️ Communications functions

## We expect to continue and develop

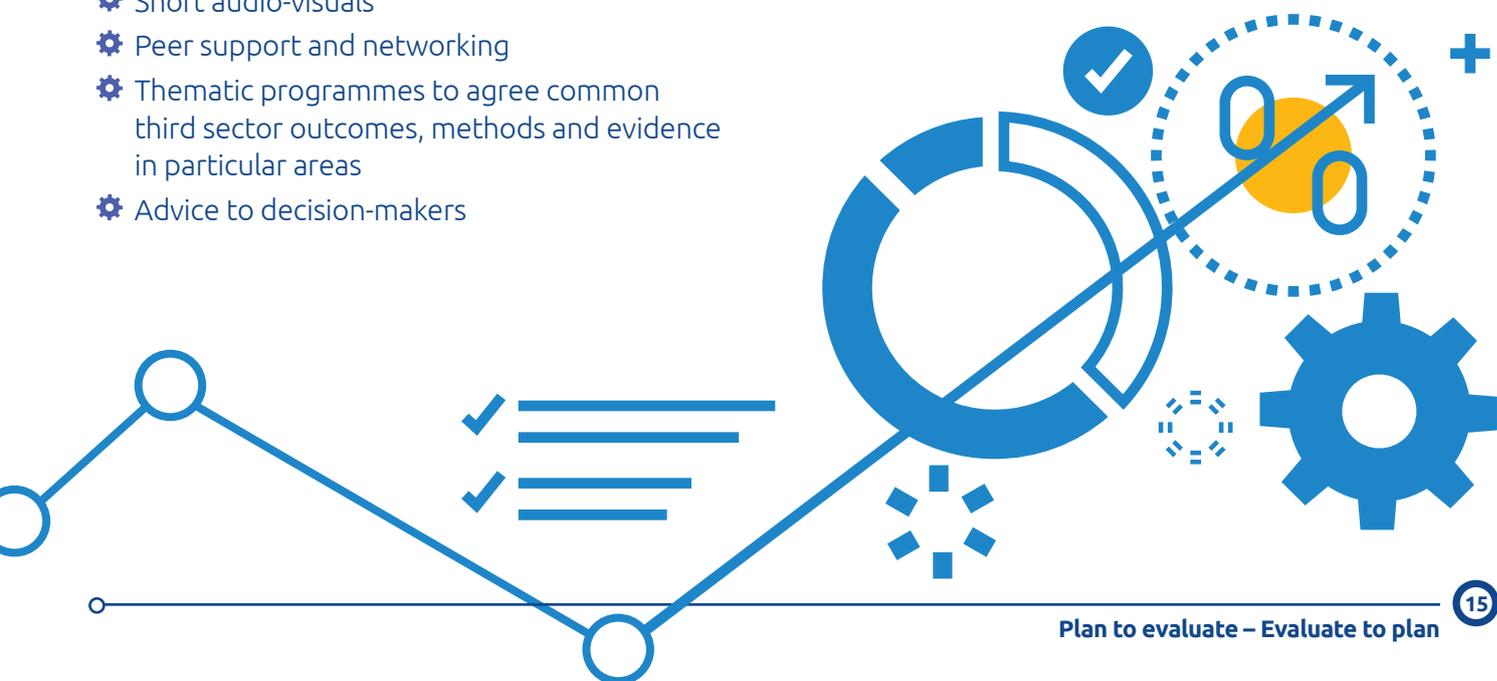
- ⚙️ 'Tough' topics in evaluation resources and advice
- ⚙️ Whole organisation tailored support
- ⚙️ Advanced workshops
- ⚙️ Webinars
- ⚙️ Short audio-visuals
- ⚙️ Peer support and networking
- ⚙️ Thematic programmes to agree common third sector outcomes, methods and evidence in particular areas
- ⚙️ Advice to decision-makers

## We are looking for opportunities to provide advanced support to help

- ⚙️ Share evaluation findings for learning
- ⚙️ Judge whether your evidence is 'good enough' for your work and context
- ⚙️ Involve service users more in evaluation and use their voices and experiences as evidence
- ⚙️ Get others in your organisation on board
- ⚙️ Learn how to analyse evaluation data
- ⚙️ Use technology for evaluation and reporting

We want to work with others, such as improvement agencies and third sector intermediaries, to share learning from, and about, evaluation and so influence the system in which third sector organisations work.

[The ESS strategic plan and a summary are on our website.](#) Please get in touch if you would like to work with us.



# OUR PEOPLE IN 2018/19

## Trustees

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Lindsay Robertson, Treasurer  
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## Stood down:

Jennifer Wallace (previous Convenor)  
Diana Wilkinson

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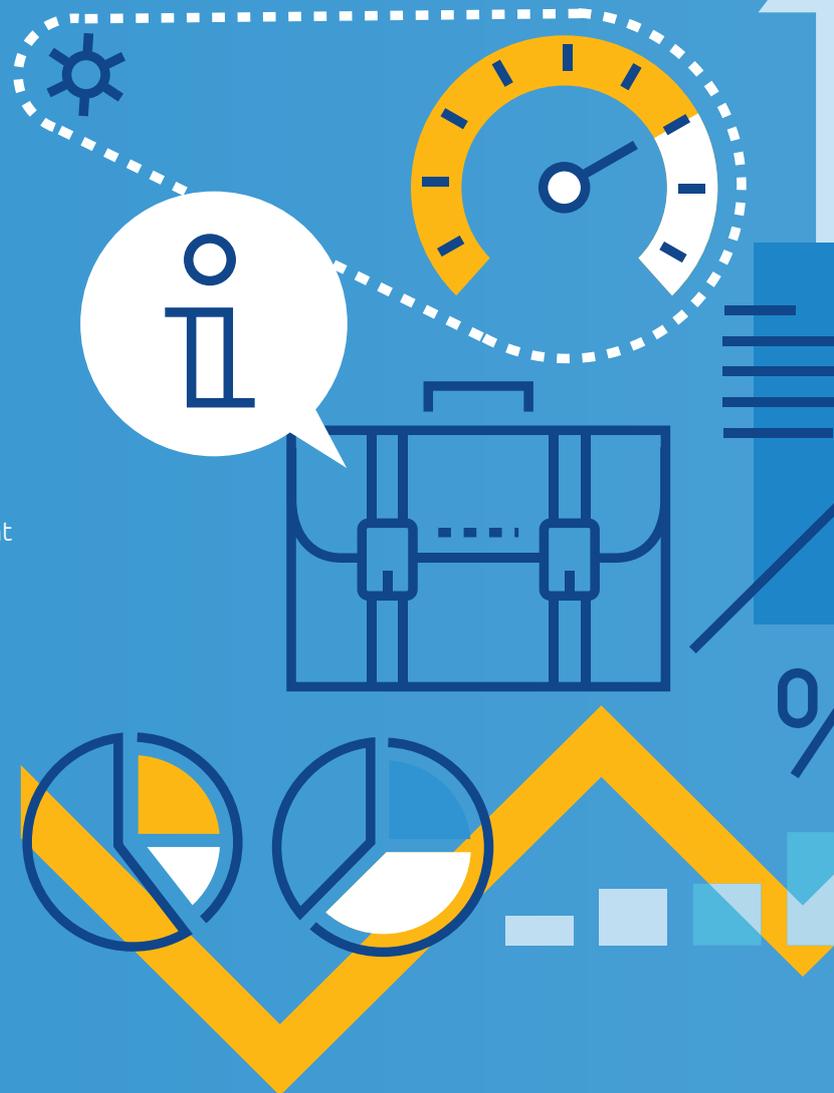
**Evaluation Support Scotland** works with third sector organisations and funders so that they can measure and report on their impact.

Our work includes delivering workshops, tailored support, learning programmes, events and facilitating forums.

For further information about our activities, resources and support please see our website:

[www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk)

September 2019



**es** Evaluation  
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