Annual review 2009-10

Evaluation Support Scotland

From the Director

2009-10 was an unprecedented year of change and uncertainty in the voluntary sector. Voluntary organisations are facing greater competition for reducing funds and are being asked to effectively deliver 'more for less'. In a climate where there is increasing pressure for resources we believe that there is an even greater need for both funders and voluntary organisations to be clear about what difference they are making to the communities they serve.

Our annual review highlights some of our work in 2009/10, showcasing some successes and challenges. This year's evaluation provided us with lots of evidence that **we have been more successful than ever at helping shape the culture of evaluation in Scotland**. Our 10 biggest achievements this year of are on the next page, but we are not complacent. Here are some of the challenges we are learning about and will address in the coming year.

Time and readiness continue to be recurring themes in our work with organisations. There can be a time lag between an organisation expressing an interest in working with us to the point where they are ready to take up the service and the support itself often needs to be spread over time. The fact that these changes take time, has also led us to think about how we get smarter at using our own database to record and evaluate our long term impact.

We have had contrasting experiences with small organisations with no staff. Some have grasped the opportunities provided by training and used them to hone outcomes and put in place simple evaluation systems. Others do not have the capacity even to take up our support, never mind work on evaluation.

Understanding 'who is the client' when a funder is paying us to support a voluntary organisation and brokering effective communication between funded and funder provides us with tensions and challenges. We have better systems in place now to manage these challenges.

We have some good experiences of working with the public sector but the lack of capacity in the public sector to understand and make use of evaluation evidence continues to be a barrier. As we now have more evidence of this we can start to influence Government and others to try to address this problem.

Steven Marwick

June 2010

Ten things you should know about ESS this year:

1. **We worked with 357 voluntary organisations** (17% more than last year). In total we worked with 410 organisations across Scotland (the others were funders, Government agencies and Local Authorities).
2. **We ran 60 workshops.** 577 people from 246 organisations attended an ESS workshop on different aspects of evaluation. After attending our workshops people consistently say that they have increased motivation to improve the way their organisation evaluates it's work.
3. **9 out of 10 of people** who receive our support say they have increased skills and knowledge to evaluate their work.
4. This year we **added 3 workshops to our core programme** outcomes for funders, logic modelling and qualitative information.
5. **We ran 195 tailored support sessions** for 123 voluntary organisations and 11 funders. These sessions focus on issues such as setting outcomes and indicators, reviewing tools, data storage and analysis.
6. Through our **strategic partnership with Scottish Government** we helped them identify the outcomes of some of their funding and development programmes and contributed to building understanding within Government about the work and impact of the third sector.
7. We **worked in partnership to influence Government policy** with Learning Link Scotland and Community Food and Health Scotland.
8. We ran a **highly successful stakeholder conference** in January 2010 called 'Learning from evaluation - fitting the pieces together'. A report of this conferences is available, from here.
9. The Wood Family Trust, Lloyds TSB Foundation for Scotland, Laidlaw Youth Trust and Inspiring Scotland all commissioned us to provide **Evaluation Support Accounts** to some of their grant holders.
10. We commissioned a scoping project, funded by the Big Lottery Fund's Investing in Ideas funding programme, to identify how ESS can support organisations to set up and **use ICT systems for storing evaluation information.**

What we did in 2009/10:

Voluntary organisations have increased skills and confidence to evaluate their work

ESS provides workshops, technical support and support via email and phone to organisations to help them get better at evaluation.

Workshops:

- We ran 60 workshops. 577 people from 246 organisations attended an ESS workshop on different aspects of evaluation.
- After attending our workshops people consistently say that they have increased skills and motivation to improve the way their organisation evaluates its work.
- When we follow up participants 3-6 months later not only do they report improvements in evaluation practices but also improvements in project planning and the ability to apply for funding.

"I am now more confident in…something I previously thought impossible. Being able to measure and define outcomes has also helped me communicate the project's successes to the local community and media... All in all I have found the training very practical and appropriate to my project."

Shetland Amenity Trust

'Word cloud' created with participant feedback from 'What are My Outcomes' Workshop The more frequently a word was used in feedback, the larger the font. (www.wordle.com)

Tailored Support:

- We ran 195 support sessions for 123 voluntary organisations and 11 funders.
- These tailored support sessions focus on issues such as setting outcomes and indicators, reviewing tools, data storage and analysis.
- About 90% have better evaluation skills and knowledge. We have been improving our systematic recording of the longer term impact of our support and although the data is not complete for the whole year we can say that at least 6 out of 10 organisations we support are using evaluation to learn and improve.

"The support and training that we have gained from ESS has been invaluable in helping us to understand and articulate our aims and outcomes, and in equipping us with knowledge of the different evaluation methods available to us…we are continually striving to make the biggest difference that we can to the lives of the young people with whom we work."

Outfit Moray

Voluntary organisations and funders have better understanding of outcomes and approaches for different areas

Learning Link Scotland

We worked in partnership with Learning Link Scotland on a pilot project to articulate the outcomes of Scottish voluntary adult learning within the context of national outcomes and Single Outcome Agreements.

- ESS facilitated an action learning set with 6 voluntary adult learning organisations and fed back to a reference group of Scottish Government, HM Inspectorate of Education, Learning Connections and Lifelong Learning UK.
- We built a logic model of voluntary adult learning activities and outcomes, which explained in broad terms what was unique about this sector and why they do things in the way they do.
- We identified some measurement tools which were being commonly used by organisations.
- Participating organisations improved their confidence and knowledge about evaluation and about their work.

Improved evaluation processes in funders and voluntary organisations

Scottish Funders Forum

We facilitated the Scotland Funders' Forum's Harmonising Reporting working group. We identified practical steps funders could take to make reports more useful and less burdensome.

- Further work is now underway to put the recommendations and conclusions into practice. A report of recommendations, conclusions and good practice notes which were published in July 2010.
- Already the work has influenced reporting requirements at a number of funders including the Big Lottery Fund, Long Term Conditions Alliance Scotland, Self-Management Fund and Lloyds TSB Foundation for Scotland.

We worked with the Move On team through our partnership with Inspiring Scotland. They really took ownership of the monitoring and evaluation plan we worked with them on, as the Manager explains:

"Move On allocated time, imagination and energy to developing the plan. Being able to use the ESS [monitoring and evaluation] template meant that we weren't spending lots of time re-inventing the wheel, but could be really productive. As a result our monitoring, evaluation and recording has improved. I am now more confident regarding the claims we are making regarding the effectiveness of our work and the impact it can have on those who use our services. Much of what we do is to enable people to develop softer skills. We are now able to fully evidence claims such as "improved confidence" increasing reliability" etc. We are now clear about what an outcome actually is, as opposed to for example an output or indicator. Asking the "so what?" question has helped develop our recording to become much more outcome focused."

Improved understanding between funders and funded organisations

Midlothian Fairer Scotland Fund
We ran training and tailored support for projects funded through the Midlothian Fairer Scotland Fund and for council staff.

- Positive feedback from projects and the Council showed how ESS was able to make evaluation accessible and to increase participants' ability to demonstrate the impact of their work and how it connected to council strategic aims.
- One participant said "This training is very useful. I have been funded for years and never had training on monitoring and evaluation"

"We have had many comments made to us about how people enjoyed [the ESS trainer's] style and delivery of the training sessions. What has come across most is that for many [ESS] we able to break down, what can be a very difficult task for some, to a more simplistic and enjoyable process. Many of the team found [the ESS trainer's] approach extremely professional and were very impressed with his knowledge and experience. Along with this we found [ESS] to be very accommodating with anything we brought to the table, and [ESS's] can do attitude was very refreshing"

Midlothian Council

FiSCAF – Faiths in Scotland Community Action Fund

The Fund's Trustees got support from ESS to put in place their Fund outcomes.

- They tested out their outcomes and reporting requirements with funded groups.
- They have mapped their funded projects against their outcomes and have systems in place to be able to aggregate and report on the impact of their funding.

Sandra Carter (chair) said:

"Projects were very positive about being involved in the process and, as hoped, took some ownership of it. There was also good representation from the committee which was equally significant to the projects and a message about the value we are placing on how we do things, not just the need for evaluation."

Iain Johnston (Operations Director) said:

"The day with you set us up beautifully and I think we'll feel more confident and focused as we go in to year two."

There is better leadership for evaluation and learning in the organisations we support

Here's an example:

Murton Wildlife Trust received tailored support sessions funded by Inspiring Scotland from us:
"Evaluation Scotland has made us look at the way in which we gather information for our recording of evidence for outcomes. It also has made us look into our own policies and procedures. Before, we had no knowledge of evaluation or even aware we were doing it, just not recording it in a way that would make collating this information easy. We definitely saw a change in the way in which we gathered our information and the process in working with ESS was very easy and they guided us through the steps we needed to follow to enhance the way in which we evaluated and monitored our project."

Increased learning from evaluation in voluntary organisations and funders

community food and health (scotland)

Community Food and Health Scotland (CFHS)
ESS has been working with Community Food and Health Scotland (CFHS) since 2007 to run a self-evaluation collaborative with local food projects.

- The collaborative provided one to one evaluation support, group sessions and peer support for the projects. This led to the projects evaluating better and providing better services for disadvantaged women and children.
- ESS and CFHS ran a joint event at the conclusion of the programme where policymaker shared ideas on how to improve the use of self evaluation evidence in policy and planning processes.
- The learning about community food and health from the self evaluation informed the Government's strategy on maternal health and infant nutrition.
- We have produced three reports documenting learning from the self-evaluation collaborative.

Report 1
Report 2
Report 3

Evaluation Support Scotland works with voluntary organisations and so they can measure their impact report on the difference they make and improve their services.

Money

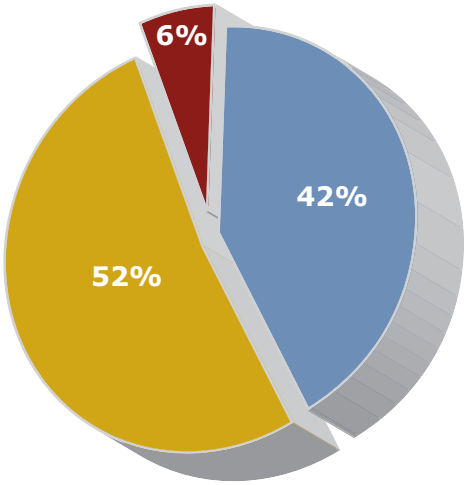
We received £279,224 in income
and we spent £274,151
We received a grant from
the Scottish Government.

The chart shows the
breakdown of how we earned our income

- **Core Scottish Government grant**
- **Earned income**
- **Other Grants**

Please contact us if you would
like a copy of our full Annual report
and financial statements for 2008/2009.
Our auditors are Geoghegan and Co, Edinburgh

ESS Income 2009/10 (% of income)



Current Staff

Steven Marwick (Director)
Dee Fraser (Policy and Development Officer)
Jacqueline McDowell (Evaluation Support Officer)
Diane Kennedy (Evaluation Support Officer)
Graeme Reekie (Training and Support Officer)
Jennifer Challinor (Information and Marketing Officer)
Cecilia Corcoran (Finance and Administration Officer)
Priyanka Satapathy (Administration Assistant)

Current Trustees and Company Directors

John Arthur
Patrick Boase
Mary Craig OBE – Convenor
Emma Crawshaw
Fraser Falconer
Dr Sam Gardner
Kirsten Gooday
Professor Linda McKie
Rev Barbara O'Donnell
Dr Nicola Richards
Robin Sinclair– Treasurer
Keith Wimbles

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STRATEGIC PARTNER OF SCOTTISH GOVERNMENT

The Scottish Government