

**Evaluation Support Scotland
10 years on**

Embedding evaluation

Activities and Impact Report
2015–2016

Welcome to **Evaluation Support Scotland Activities and Impact Report 2015–16**

Evaluation Support Scotland (ESS) works with third sector organisations and funders so they can measure and report on their impact and use learning to improve practice and influence policy.

From our Director, **Steven Marwick**

In May 2015 we celebrated ESS's 10th year with our conference, 'Looking back, Looking forward'. We reflected on ten years supporting organisations to show the difference they make, and on changes in evaluation practice in that time.

In ESS's early days we spent much of our time supporting the third sector with basic evaluation language and self-evaluation skills, and on making the case for less burdensome reporting to funders. 10 years on the third sector as a whole has a much better understanding of outcomes. And funder reporting is mostly (though not always!) more meaningful and less burdensome – for funders and funded.

That means we can spend more time helping organisations use and share evaluation. We can help organisations involve the people they work with in evaluation. And we can start to tackle the really tricky evaluation challenges like evaluating prevention, evaluating policy influence and economic evaluation.

At the same time, the "Scottish Approach" to improving public services has given a stronger emphasis to outcomes and to the **use** of evaluation and evidence. The policy environment is more receptive to evidence from the third sector and to evidence from the lived experience of the people the sector works with.

So this Activities and Impact Report 2015/16 focuses on how we are evolving our services to support third sector and funders to **embed evaluation** through **integrating** evaluation, **influencing** policy and practice through third sector evaluation and **involving** people in evaluation. At the end of the report there's a snapshot overview of our activities and outcomes for the year.

Thank you for reading and please get in touch with any feedback.

Steven Marwick
Director



Integrating

This year we improved how we help organisations hold onto evaluation skills and knowledge after we've supported them.

We created an Embedding Evaluation Diagnostic Wheel drawn from our own research. This helps organisations assess if they have factors in place to enable an evaluation culture, such as leadership, linking evaluation to strategy, internal systems and staff support. Organisations told us the wheel helped them integrate evaluation practice in a way that works for their organisation.

Here are some other integration-related examples we have done this year.

Setting evaluation support goals

Charities referred to the Evaluation Support Account funded by Lloyds TSB Foundation for Scotland set goals before attending workshops and receiving tailored support. This helped organisations make better use of support and time. They also had a clearer understanding of what they had learnt.

Sheddocksley Baptist Church Evaluation goal: Gather better evidence

"The lessons learnt in attaining our goal will stand us in good stead for years to come."

Hawkhill Community Centre Evaluation goal: Improve evaluation systems and reporting

"Having a goal to achieve was a really valuable tool. We now know exactly what funders are looking for rather than wasting time on gathering irrelevant information."
May Richmond

Supporting networks of evaluation champions

Our Embedding Impact Practice Groups have helped organisations with good existing understanding of outcomes and methods, to further improve and embed their organisational evaluation. We helped them use Inspiring Impact (II)¹ Measuring Up! and develop logic models and evaluation plans. We shared learning with our wider evaluation champions' network at an "Embedding evaluation for learning" event.



"Having evaluation embedded in our work is absolutely essential to demonstrate the difference we make."
Heather Boyce, Anne Frank Trust UK

¹ Inspiring Impact is a UK initiative that aims to change the way the UK third sector thinks about impact

Helping organisations to integrate evaluation into strategy

"We found it [logic modelling] a useful exercise, and have decided to integrate this into our Communities Team strategy for 2016–19."

Tom Black, Foundation Scotland (member of Embedding Impact Practice Group)

"The team has finally bought into evaluation and are regularly giving me information."

Manager

"My team use the 'something I saw/ something I heard' resource you showed us and give me something every week."

Manager

Delivering additional workshops on embedding evaluation

We have worked with Voluntary Action Fund and organisations funded through the **Violence Against Women and Children** fund over three years to help them improve evaluation practice and demonstrate impact. In this last year we ran 'Embedding evaluation into everyday practice' for 52 staff from 38 organisations. We also created a resource to 'capture the casual' through observations and conversation.

"Workshop very useful because there was time to make it relevant to my project and get advice on my project's outcomes."

Preshal Trust

Improving our workshops – "Let's evaluate!" programme

We revised and improved our core workshop programme, drawing on our own evaluation and learning. 'Let's evaluate!' has three workshops on setting, measuring and reporting on outcomes.

Our training approach remains fun, creative and practical. We have allocated more time for participants to relate learning to their project, and incorporated embedding evaluation and involving service users throughout. We also have 'advanced' workshops on evidence, logic modelling and case studies.

"Good interaction with trainer and trainees, encouraging and interesting training method. Made you feel your opinion was valuable and gave you confidence."

Action In Mind

"Well put together, perfect balance of theory and games, very useful pack, relaxed atmosphere and lots of interaction opportunities created by trainer."

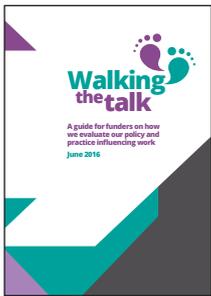
Christina Rizou, Welcoming Association



Influencing

We are increasingly assisting third sector and funders to **use** evaluation learning and evidence to influence policy and practice. In 2015/16 we made a good start developing methods and case studies.

Evaluating funders' influencing work



We facilitated The 'Funders Influencing Policy and Practice' learning set, funded by The Robertson Trust. Seven funders shared ideas, experiences and approaches to evaluating policy and practice influencing work and produced a guide for other funders, *"Walking the Talk"*, published in June 2016. The learning set was also evidence in itself of how funders can collaborate meaningfully.

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Evaluating third sector's policy influence

We facilitated a working party of third sector organisations on evaluating policy influence and developed a draft resource. Participants thought this work had been "surprisingly good", "reflective" and "stimulating".

"Hugely valuable. Really developed our relationships. We were given space to speak. We are much more mindful of how we can work together."
Tara Murphy, Carnegie UK Trust

"The conversation has gone beyond this group – we're now discussing this more internally and it's informing the way we work."
Cassy Rutherford, The Robertson Trust

"I really liked the problem tree and the logic model – they capture well the discussions the group had."
Paul Wallace, Keep Scotland Beautiful



Strengthening research links between third sector and academia

ESS convenes the **Scottish Third Sector Research Forum** to promote and share research from and about the third sector, and its use to improve policy and practice.



In 2015/16 the Forum ran its second 'Let's collaborate' event attended by 60 people from the third, public and academic sectors. The Forum pulled together third sector research into two resources:

- "The benefits of inclusive volunteering."
- "Third Sector Partnership Compass: what research tells us about engaging in positive partnership."

"It was great that the event had really clear aims that were pitched at exactly the right level for exploring relationships. I have a much clearer view of the barriers and solutions." *Louise Meikleham, the Scottish Charity Regulator*

Our **Knowledge Translation Network** produces resources to help the third sector generate and use evidence to influence policy and practice. This year we developed and launched "Collaborating with academics" to help third sector get the best from academic collaborations.

"The guide will prove useful when I take it back to my organisation."
Stepping Stones for Families

"Excellent opportunity for both 'sectors' to share and learn. More informed as a result."

**Crawford Bell,
YMCA Scotland**

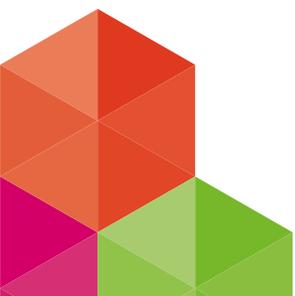
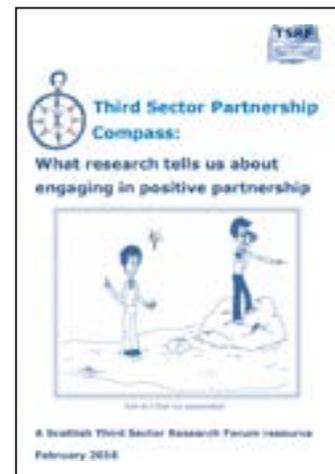
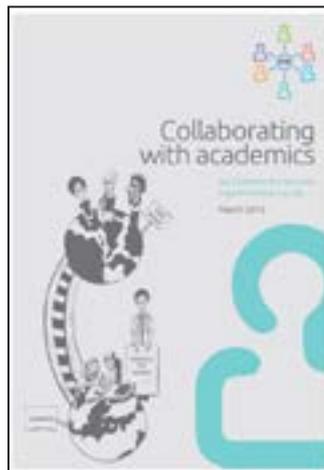
Evaluating prevention

We produced a paper about evaluating prevention that draws on learning from our past thematic programmes.

Our Violence against Women and Girls working group looked at evaluating prevention and how it differs from early intervention. The group developed a resource with logic models, indicators and methods.

"Prevention is a key government priority, without a shared understanding (of prevention) and a commitment to a common goal the funded organisations could never meet the expectations and long term vision of the Scottish Government. This has been a challenging, brain fuggling process that will hopefully facilitate learning, development and move us all towards a shared vision. The journey has been really useful." *Fiona McCabe, Women's Aid East and Midlothian*

"There is definitely an opportunity for this work to significantly influence and feed into wider conversations." *Scottish Government Official*



Using third sector evidence to inform policy making



We wrote 2 reports for Scottish Government: The Story of Support in the Right Direction explains how we helped 42 Independent Support projects measure and report on the impact of their work over the previous 3 years.

What Works in Independent Support is an analysis of the final reports submitted by these same 42 projects to Scottish Government and was launched in February 2016.

“The evidence and learning from this work will both contribute to our national work plan for 2016–2018 and provide a platform to further enhance and build the capacity of SDS... I think the document really brings to life what people are experiencing.”
Lorna Ascroft, Scottish Government



Threading the Needle (TTN) is a Scottish Government funded programme to support four health and social care partnership areas use third sector evidence to commission outcomes for health and social care. We are working in:

Fife: to find out how befriending can help the Partnership achieve its strategic priorities.

Glasgow: to explore the role of the third sector in anticipatory care planning.

North Ayrshire: to show how good, evidence-based commissioning decisions are made.

Perth and Kinross: to demonstrate making the best use of third sector evidence in locality planning.

Full reports and learning points will be available in early 2017

Involving

ESS encourages third sector organisations and funders to involve the people they work with in evaluation. Indeed user involvement is one of our 2015–19 strategic priorities.



- We have promoted **Why Bother Involving People in Evaluation? Beyond feedback – a workbook** at conferences, through blogs, in ‘Service-User Involvement’ workshops and thematic programmes.
- A “Why Bother?” session was delivered at the Joint Improvement Team’s Co-Production conference. It was the most popular session.
- 17 out of 21 delegates at our birthday conference “Why Bother?” breakout sessions said they would definitely use the workbook.

Everyone has a story

ESS worked with learning sets of third sector practitioners, over twelve months, to collect data and feedback from the children and young people whose parents are in recovery from problem alcohol and other drug use.

The programme was managed and run by the Lloyds TSB Foundation for Scotland’s Partnership Drugs Initiative (PDI) with additional funding from the Robertson Trust and Scottish Government. We contributed to a pack of resources “Everyone has a story” to be launched by the PDI in June 2016. The work reinforced the value of giving credibility to the **voices** of children and young people and the **role** of practitioners in collecting evidence.

“Gave me a good basis to go forward with evaluations and not to be scared.”

“Has made me reflect upon how evaluation can be identified as being integral. We tend to ask service users what they want and then evaluate rather than follow a process.”

“Very informative and useful. Very easy to use and explain.”

Practitioners said they were proud of what they had achieved and were keen to do more:

“Being part of the Action Learning Set Group has been an invaluable and very enjoyable journey. I have learned so much about my own practice on how professional and personal values can get in the way of Active Listening. Taking this personal journey has made it easier for me to understand my own staff anxieties and ... enabled me to support them through these. I would recommend this model ... and have already set this up with my other staff teams as a way of improving practice.”

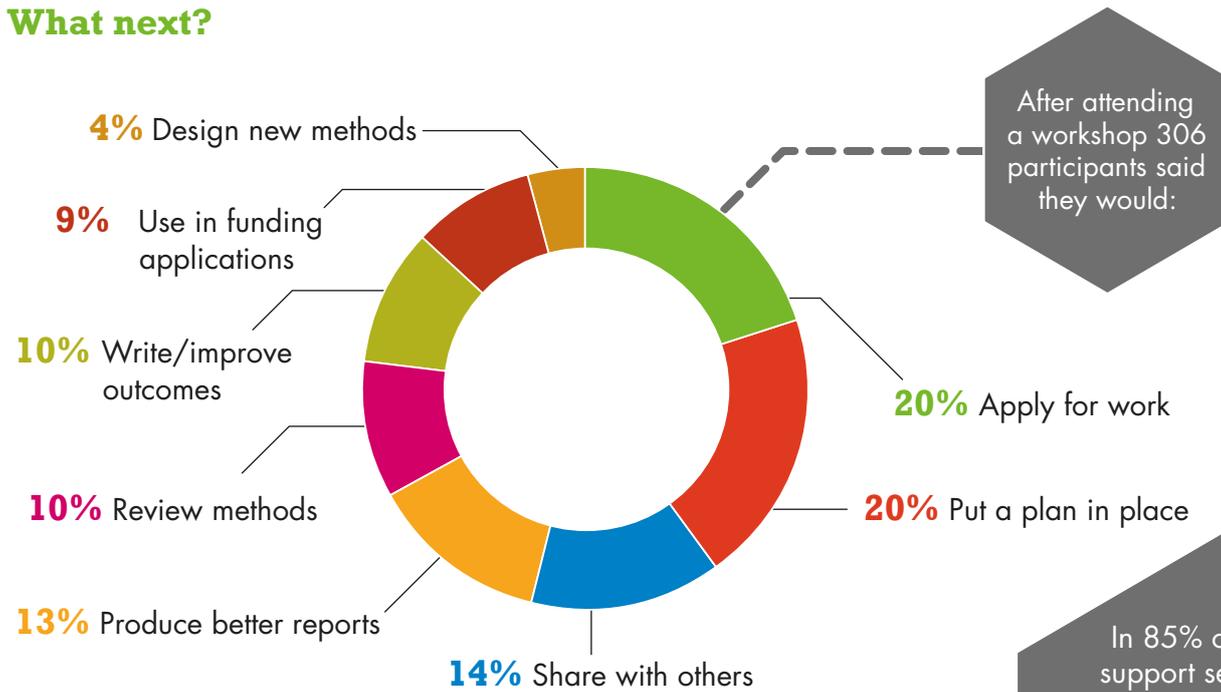
Grahame Cooper, Manager, Action for Children



A snapshot of the difference we made in 2015/16

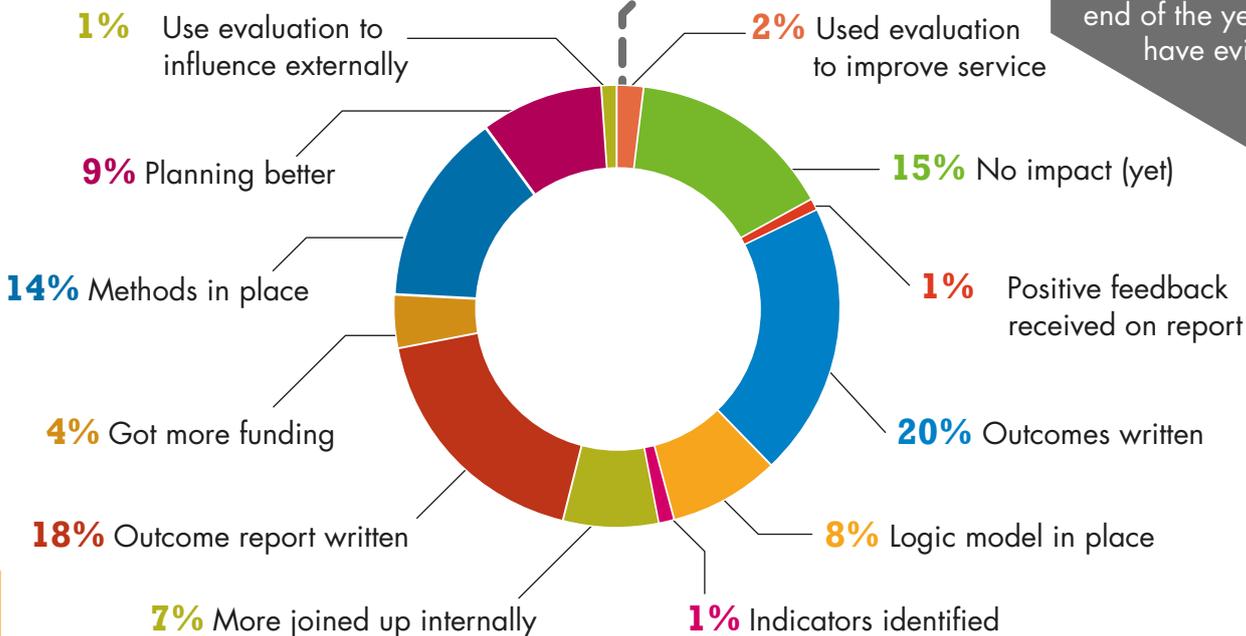
Almost 100% of workshop participants reported improvements in learning against workshop outcomes.

What next?



In 85% of tailored support sessions we have evidence that we improved participants' evaluation skills and confidence. Some tailored support happened at the end of the year so we don't have evidence yet.

Use of skills



Some evidence of our impact:

Improved planning and doing evaluation

"...I have now created an Evaluation Plan for the organisation ... This will help us become more effective in measuring the impact of our work, and ultimately continue to develop and tailor our programmes for our beneficiaries."

Jenny Coxon, Impact Arts

"The resources available through the ESS website were very helpful in wrapping my head around the evaluation process. I found that going through the guides and using the models really made evaluation much clearer for me. I used the knowledge I gained through these resources and the workshops to create an evaluation plan for a complex programme." *Lauren Tuckerman, Community Enterprise In Scotland*

"You have had an impact on how we record data, and you have helped us identify further ways of developing case studies and young people's stories." *Hayden Kilpatrick, The Junction*



Better reporting to funders

"Basically we have now got people into the mind set of asking 'so what? What difference do we actually make? This data is particularly useful when reporting to NHS who are our largest funder. Your initial guidance, access to your training materials and follow up advice has proved invaluable."

Del Gunn, Western Isles Association for Mental Health

Improving services, meeting needs

"It [evaluation support] has also had an impact on the way we offer support to women whereby gathering evidence becomes a part of the way we work. Using the new evaluation tools has enabled us to identify project indicators, to look at what we have learned and what we need to change."

Women's Aid Manager

"I found the workshops very useful indeed and I used the knowledge I gained there and from speaking to you to gain Approved Provider Standard with the Mentoring and Befriending Foundation." *Terri Bearhope, Seton Care Befrienders*

The Scottish Government has provided new funding for organisations supporting families affected by imprisonment. This was partly attributed to the improved evaluation evidence generated through a learning set we ran in partnership with The Robertson Trust.

Helping others to support evaluation

"I found the work delivered by ESS to be high quality and the approach was refreshing and thought provoking. I have used the training to deliver 'nuts and bolts' sessions on outcomes, evaluation and logic modelling." *Bill Clements, CVS Inverclyde*

"I just wanted to thank you for the blog about using 'evidence' versus 'information' – totally helped my own thought process and conversations as I work with the organisations we fund around evaluation."

Colleen Souness, The Robertson Trust

"I have been using the training notes when I am creating reports or new applications which is always a good sign."

Andy Robin

Overview of activities in 2015/16



The year in numbers



² An evaluation support account (ESA) is when a funder pays for funded organisations to receive a package of support

ESS learning in 2015/16

We hope it's clear throughout this review that we try to practice what we preach at ESS and use our own evaluation to improve. Here are some other learning points that will feed into making ESS even better next year:

Funders increasingly want to understand not just **whether** outcomes were achieved but also **how**. So we are building 'process' elements into our support.

We continue to play a useful role in creating safe spaces for **funders** to learn with and from each other. We have learned more about how to do this well.

In our Thematic Programmes we usually produce a **pack of materials**. We have evidence that packs are used but we need to identify how best to maximise the impact of packs in future.

The level of **engagement of Scottish Government** can impact on how well we can achieve sustained evaluation skills and support third sector learning to improve policy. A strong example is in Self-directed Support.

ESS is seen as having particular expertise. The Scottish Approach – specifically **“prevention”** and **“asset-based approaches”**. We will do more to share what we know.

We need to develop more methods and examples to meet the increasing interest of funders and the third sector in evaluating policy influence.

Train the Trainer helps us reach more third sector organisations and we now have a number of 'train the trainer' approaches we can roll out. We might have a new role to facilitate networks of evaluation experts.

Organisations are enthusiastic about **user involvement in evaluation** but need support to do it.



Case studies

Here are two case studies which are examples of two areas of our work, one supporting a large organisation to embed evaluation throughout different projects and the other, a thematic programme to develop an evaluation toolkit.

[CrossReach Children & Family Services](#)



CrossReach runs 30 children and family services. A review highlighted the need to improve the outcome evaluation and to align outcomes to GIRFEC and the SHANARRI³ Wellbeing Indicators. Staff from different services attended ESS's four evaluation skills workshops and one embedding session, and received tailored support.

"Participants were continually required to think out of the box, and not focus on how their service currently works, but how they could work in the future to record client outcomes to provide bespoke individual client feedback and overall Service Evaluation Reports for funders and stakeholders."

Difference made

All the participants found 'every bit of the course was valuable and had helped them see evaluation and outcomes as part of their

[Measuring Outcomes Citizens Advice \(MOCA\)](#)

Funded by [Citizens Advice Scotland's \(CAS\) Development Committee](#), this is a partnership programme between Parkhead CAB and other Citizens Advice Bureaux (CABx). It aimed to increase participating organisations' knowledge and skills to evaluate work, and to increase understanding of the value of advice work amongst funders and policy makers.

This year we completed the [Measuring Outcomes Citizens Advice evaluation pack](#), ran

general remit'. They reformatted their database to improve outcome data recording and adapted ESS templates and tools to meet their needs.

"The templates provided have saved me so much work and reduced my anxiety! The crèche worker has also fed back that she has found the evaluation wheel easy to use."
Jackie Walker, Manager, Bluebell Perinatal Service, CrossReach Counselling

In summary

"Evaluation is always a challenge because for the majority of families we work with English is not their first language and so they may not fully understand the question. The training from ESS has given us the confidence to think outside of the box and use a variety of interactive methods to monitor and evaluate with families. It has opened up a different way of thinking for us." Liann Weir, Daisy Chain

three regional days for bureaux managers on how to use the pack and presented the pack at a large national conference.

We learnt

- Learning set members became ambassadors for the pack and for evaluation in general.
- Development officers could play a crucial role in cascading the use of the pack. This will help an even greater uptake of use.
- Feedback from this dissemination led to a new Harmonising Indicators Project to develop a more proportionate and useful monitoring and reporting system for CABx, starting in May 2016.

[The full CrossReach case study is on our website](#)

³ Getting it Right for Every Child [SHANARRI](#)

Our people

Trustees

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Lindsay Robertson, Treasurer
Lynne Irons
Dr Anita Morrison
Janet Morton
Professor Stephen Platt
Linda Rodgers
Stephanie Rose
Diana Wilkinson
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Tom Scott	Training Officer
Lydia Morrow	Finance and Administration Manager
Jane Marryat	Research and Communications Officer
Wing Yen Yip	Workshops and Events Administrator

Stood down:

Kirsten Hogg, Convenor
Emma Crawshaw

Our resources

Our income was **£322,786** and we spent **£342,937**. This includes some restricted income we received last year but spent this year.

We received grants from the Scottish Government and The Robertson Trust. The rest of our income comes from contracts and fees.

Our full Annual Report and Financial Statement 2015/16 is on our website



Picture credits and acknowledgements

Thanks to Andrew O'Brien who took the photographs of ESS's 'Looking back Looking forward' conference featured on pages 3, 5, 9, 13 and 15, and who filmed 'Let's evaluate'.

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Report designed and printed by www.publishingbureau.co.uk



September 2016

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

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Funded by:



Registered Company:
SC284843

Scottish Charity:
SC036529

VAT number:
923 2102 72



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