Activities and impact report

2017/18

Supporting funder and funded relationships

Evaluation Support Scotland

GOOD RELATIONSHIPS ARE THE BASIS OF GOOD EVALUATION

Achieving impact is often dependent on good relationships – with service users, funders, commissioners, and policy makers. Almost all the work we do at ESS involves positive relationships with third sector organisations, funders and Government. Like anyone else we play different roles depending on the relationship. We support third sector organisations to evaluate their impact and tell their funders about the difference they make. We support funders and commissioners to understand third sector evidence and how to use it. Sometimes we work with funders and funded organisations together to help them better understand each other; occasionally we find we act as brokers and even mediators. This year we have played all these roles and in the process we have learned a lot about funder and funded relationships.

In this activities and impact report 2017/18 we tell you about the successes and challenges of our work this year and we've put a focus on sharing our learning about the relationship between funders and funded organisations.

I hope you enjoy reading this report. Please get in touch with any feedback.

Thank you,

Steven Marwick
Director

our money

income £410,694
spent £373,215

We received grants from the Scottish Government, The Robertson Trust and NPC. The rest of our income comes from contracts and fees and includes £33,600 of funds that, to comply with regulations, was recognised in 2017/18 but will be spent on work to be completed in 2018/19.

Our full Annual Report and Financial Statement 2017/2018 is on our website.

overview of activities in 2017/18

"A really enjoyable set of workshops. Delivery excellent, clear and engaging - looking forward to getting to grips and enjoying evaluation rather than dreading it as a fire fighting task. Thank you."
Alison Goodfellow, MAXwell Centre

500
INDIVIDUALS PARTICIPATED IN 'LET'S EVALUATE!' WORKSHOPS

OUR RELATIONSHIP WITH THIRD SECTOR ORGANISATIONS

Our 'Let's evaluate!' workshops and tailored support sessions help third sector organisations to learn about how to evaluate and embed evaluation into practice.

our impact

Setting outcomes and indicators
"I was able to go home and re-write my outcomes and indicators, making them simpler and more effective."
Iona Craig, Maryhill Parish Church

Writing evaluation plans
"We're now developing an evaluation plan which includes all our activities."
Melanie Hall, St Paul's Youth Forum

Better reporting
"Reporting is much easier and more useful."
Sara Maclean, Argyll & the Isles Coast & Countryside Trust

Use of appropriate evaluation methods
"We have put in place new evaluation techniques tailored to the projects, service users and funders."
Robyn Friel, Epilepsy Scotland

Getting staff and trustees on board
"We are now developing a new outcomes training for our own staff team." **Gary Dewar, Children 1st**

"I've got greater understanding about the role of trustees and how they can support the evaluation process."
Lauren Burr, Cyrenians' Scottish Centre for Conflict Resolution

we learnt

- Following up workshop participants provides us with positive feedback about how participants sustain their learning. However, not everyone sustains their learning. Sometimes that's for reasons we can't control but we will do more signposting to our networking events and resources to maintain evaluation enthusiasm.

- Workshop participants build basic skills to analyse data but there is increasing appetite for us to provide more sophisticated guidance on qualitative analysis (see example quote below). We'll consider this over the coming year.

"It would have been useful to have more time on analysing - for example coding + systems for analysing - including practical example."
Kelly Minio-Palvello, LGBT Health & Wellbeing

EXTENDING OUR RELATIONSHIP WITH THIRD SECTOR ORGANISATIONS

extended tailored support

We've been doing more work with organisations that have good evaluation in place for individual projects but not for the organisation as a whole. For these organisations we offer multiple sessions over an extended period to help the organisation become more consistent and demonstrate impact as a whole. The following are examples of how extended tailored support works.

edinburgh leisure

Edinburgh Leisure commissioned 'Let's evaluate' workshops and 6 tailored support sessions to develop a logic model, outcomes, indicators and methods to collect evidence.

"Edinburgh Leisure's Active Communities Team has increased their self-evaluation skills thanks to Evaluation Support Scotland. The team found the support really useful - giving them time, confidence and skills. In particular we've found that they have clarified project outcomes, identified indicators and have been given the confidence to do things a little differently."
Zoé Mobey, Head of Funding & Evaluation, Edinburgh Leisure

See page 15 for Edinburgh Leisure case study

SAMH

We supported SAMH to create an evaluation champions' group to implement an evaluation framework throughout the organisation

"Staff said using the framework had improved the care and support for people … The framework and paperwork is effective for people moving from one service to another – it makes the transition more seamless. It supports with risk management, it really works. Care Inspectors have given positive feedback. Managers feel more confident in promoting their service." **SAMH**

victim support scotland

We provided support to pilot their new evidence collection method. We carried out an analysis of pilot data against their new outcomes on their behalf.

"Without the expert knowledge of ESS we would most likely deviate from the good work done so far and stray from the main objective."
Eilidh Brown, Victim Support Scotland

See on our website: VSS's case study 'Using staff experience to inform evaluation systems'

OUR COMMUNICATIONS

We continue to increase our reach. We revamped our website, including an improved resources section, and increased our social media presence via Twitter and blogs.

We produced 10 publications and 12 blogs. We added 4 new method sheets and updated 3 support guides. 16,168 documents have been downloaded from our website.

we learnt

It is difficult to get evidence about the impact of communications but we'll explore this in the coming year. Twitter is one useful source of evidence.

"Loved the interactive evaluation methods. Made me think 'more outside the box' now in relation to methods." **Wheatley Group**

"The resources available from the workshop and on the website have been extremely useful with my work. I use them regularly and direct colleagues to the website." **Funder survey 2017**

"We often recommend your excellent resources to our grant holders (and not just the Scottish ones!)." **Tweeted by Tudor Trust**

INSPIRING IMPACT – THIRD SECTOR PEER RELATIONSHIPS

Inspiring Impact is a UK-wide collaborative programme on impact. ESS delivers the programme in Scotland and our focus now is on facilitating peer support networks.

This year we

RAN **4** EVENTS ON TOPICS REQUESTED BY THE NETWORK

- Launched 'Making it stick - guide to embedding evaluation'
- 3 events: Getting others on board with evaluation; Sharing tools; Sharing the news and feedback from your evaluation

PRODUCED **2** CASE STUDIES

- 'Harnessing the enthusiasm of staff to make evaluation stick'
- 'Getting colleagues on board with evaluation'

74 INDIVIDUALS ATTENDED THE SERIES OF EVENTS

PILOTED AN ONLINE NETWORK FOR EVALUATION CHAMPIONS #IMPACTCHATS

What participants are taking away from the events:

'Making it Stick' launch

"Shared good practice. Action Planning around improving impact monitoring more effectively. Resources and further websites that I will be researching to improve my project's evaluation."
Jean Monaghan, LGBT Health & Wellbeing

Getting others on board with evaluation

"Inspiration and commitment to be more systematic and creative in engaging volunteers with evaluation; introduce more participant-led evaluation; questions to highlight at the next board meeting."
Elaine Mowat, The Welcoming

Sharing tools for evaluation

we learnt

Enabling third sector practitioners to network helps with peer support.

"The workshops came at the perfect time as we had a load of grant reports to send in the month or so afterwards […] it's improved my initial applications too because I've been able to provide much clearer outcomes and indicators from the start."
Gareth Toner, Marie Curie

"Really useful, going away with much clearer idea & understanding of evaluation."
Epilepsy Scotland

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ORGANISATIONS BENEFITTED FROM FREE SUPPORT THROUGH ESAs

SUPPORTING EFFECTIVE FUNDER AND FUNDED RELATIONSHIPS

evaluation support accounts

Evaluation Support Accounts (ESAs) enable us to deliver a support package to third sector organisations paid for by their funder. ESAs mean 78% of third sector organisations we work with get their support for free. ESAs also enable funders to, in the words of Douglas Hamilton, R S Macdonald Charitable Trust (in his blog) "build stronger relationships with the charities we support".

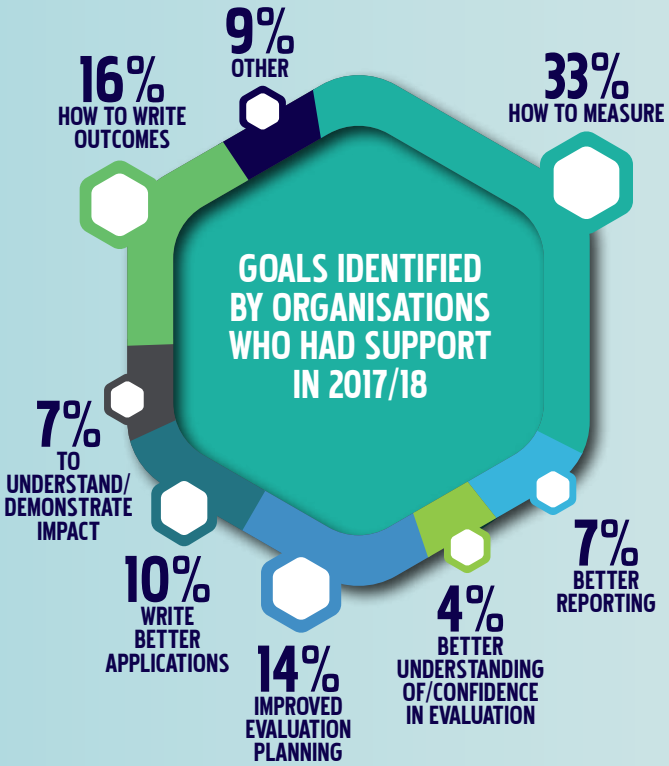
This year we secured a 3 year support contract with Big Lottery Fund, to go alongside our support for grantholders of the R S Macdonald Charitable Trust, Corra Foundation, The Robertson Trust and Church of Scotland Go for It Fund.

Funders tell us that our support helps organisations write better reports and make better funding applications.

We've also convened meetings of all our ESA funders so they can share learning with each other and improve the service they get from us.

goal setting for ESAs

We work with both funder and funded organisations to ensure that learning is embedded. When we start working with ESA referrals we agree a goal to focus the support we give to meet the organisation's needs.



bishopbriggs community church

Goal: 'Outcomes to be refined and tools identified'

Did our support help achieve your goal?
"Yes, it did. I hadn't realised that I had made my outcomes more complex than they needed to be. For example, one of my outcomes could actually be separated into 3 outcomes. The support I received helped me to simplify them and use language that made the outcomes more measurable".

Has the support made a difference to the way you self-evaluate?
"Yes, the team are all aware of the outcomes and are all responsible for feeding back when they can see indicators of these outcomes. We have recording sheets specifically for this. We are more creative about getting the young people to reflect on the sessions in order to continually capture their progress".
Laura Hopkins, Youth and Community Worker

we learnt

- Goal setting for ESAs works well and ensures that the support we give is appropriate and relevant.
- We can join things up so different funders pay for different support – and third sector organisations can see that different funders actually have similar evaluation and reporting requirements.

understanding intermediaries' impact

Third sector intermediaries and their funders face particular challenges because outcomes for end beneficiaries are several steps removed from the direct work intermediaries undertake. Funded by Scottish Government (one of intermediaries' main funders), this programme aimed to explain and measure the impact of national third sector intermediaries.

We

- Held a seminar attended by 39 people, to share last year's scoping study.
- Developed 'A resource for understanding Intermediaries' impact' with a small working group. This was shared at a recall event.

We've received universally positive feedback for this piece of work.

"It does a great job at articulating what we do."
Reported by table facilitators at event

"Make time and space to read carefully and think about, review/revise how we explain SPPC drawing on the clarity of the resource, use some of the templates on the new area we are developing."
Mark Hazelwood, Scottish Partnership for Palliative Care

we learnt

- Even tough evaluation challenges can be addressed by bringing people together and harnessing the knowledge in the room.
- We have more work to do to understand how the resource can be used by intermediaries and funders to create more consistent and improved relationships between funder and funded intermediaries. We also have more to do to support measurement of outcomes.

SUPPORTING FUNDERS TO IMPROVE THEIR RELATIONSHIP WITH FUNDED THIRD SECTOR ORGANISATIONS

funder learning programme

This was the final year of our four-year Funder Learning Programme (FLP) funded by The Robertson Trust to help funders increase their skills, knowledge and confidence on evaluation and reporting, and to set realistic requirements of third sector organisations.

across the four years we reached

This year there was a big focus on funder/funded relationships. We researched and wrote 3 funder/funded relationship case studies:

- 'Adapting project outcomes if things don't initially work out'
- 'Clear communication and constructive feedback'
- 'Doing something different to feedback to our funders'.

We ran a discussion event for funders and funded on 'Getting the best from core funding.'

We helped funders think about how they can make better use of funded organisations' reports, through a discussion event and resource: 'Funders' online reporting systems - a reflection paper.'

"In some ways we need to take some responsibility for our own learning and putting it into practice – that is the hard bit though."
Funder

The difference the programme made overall:
Feedback from our survey (25 funders)

- ✓ The most significant difference for most funders was the opportunity to problem solve and learn together
- ✓ Most funders said they learnt something new and did something differently as a result of their participation in FLP
- ✓ ESS facilitated a trusted space for funders to learn from each other and, to a slightly lesser extent, provided new learning directly.

"Other people's experiences can provide insight or solutions that you haven't thought of or considered in sufficient depth."

"We changed our evaluation procurement process; it now has a greater focus on the people doing the evaluation, how they will engage with our grantholders and participants."
Funder survey 2017

we learnt

- Funders strongly value the opportunity to learn together and share practical ideas.
- ESS is valued for our flexibility, expert support and role as facilitator. We are able to create productive safe spaces and imaginative events.
- Funders are improving their evaluation and learning.
- Funders recognise that they need to take responsibility for their own learning in the future, perhaps through Scotland Funders' Forum and Scottish Grantmakers.

Tailored support and workshops for funders

We provided tailored support for 5 funders including Big Lottery Fund's Early Action Fund and Scottish Power Foundation, and ran "Getting the best from your Grantholders" for Historic Environment Scotland.

Funders are taking up other opportunities to learn from us and other third sector organisations at our Inspiring Impact events. We will continue to encourage funders to learn alongside third sector organisations.

helping a funder to evaluate a programme

Over the last three years we supported Corra Foundation to evaluate their People in Place Programme – a community-led initiative in 10 small communities that don't access traditional grant-making.

This year we delivered tailored support and ran reflection and learning days to help Community Co-ordinators (Corra staff) develop tools and approaches to collect a wide range of evidence and make sense of the evidence they collect.

As a consequence, Community Co-ordinators are even more reflective as practitioners and more confident in collecting stories from the community.

"ESS really helped by building confidence and skills. ESS staff supported the team to look at how we capture conversations and insights and suggested tools that were simple, effective and practical."
Elaine Wilson and Pam Dawson at meeting with Corra Foundation

we learnt

- Community and asset-based work requires a different approach to evaluation. Corra and ESS learnt to adapt an approach with more emphasis on acting and learning before planning activities and outcomes, and that enables collection and reflection on experiential and qualitative data.

harmonising reporting

We published our research 'Funders and funded in harmony - Where are we now?' which reports on the progress of Harmonising Reporting over 10 years.

we learnt

Harmonising Reporting is still relevant. We made positive progress but there is still work to be done.

WORKING WITH FUNDERS TO DISSEMINATE LEARNING

community resilience
(community groups responding to emergencies)

We worked with Scottish Government to produce a community resilience toolkit. At the launch event we found that even tiny, volunteer-run community groups are enthusiastic about evaluation and want to learn and improve.

spirit of 2012 – london 2012 & glasgow 2014 legacy

Following on from previous work, we facilitated a learning set of funder, funded organisations and Agile to develop Thrive - an online evaluation toolkit based on the learning from Spirit 2012's Physical Activity Fund. We contributed to roadshows to promote Thrive.

"Share stories, do the little things to evaluate – measure the impact, maximise resources, work together!" **Roadshow participant when asked how Thrive will help them**

SUPPORTING OTHER FUNDERS – PUBLIC SECTOR FUNDERS AND DECISION MAKERS

We have supported Scottish Government as a funder in a variety of ways.

ministerial commitments

We worked with Scottish Government Third Sector Unit to implement Ministerial commitments on core and long term funding.

We

- Undertook an enquiry to find out the third sector's perspectives on the Scottish Government as a funder.
- Ran workshops for officials.
- Supported selected officials and their grantholders.

This work enabled us to play a role in brokering open dialogue between funder and funded organisations. For example, having supported Victim Support Scotland (VSS) to improve its evaluation system last year, this year we facilitated meetings with Scottish Government so that this new system became the basis of its Scottish Government funding.

"The support and facilitation you provided at the meeting ensured the agreement that was reached was outcomes focussed and provided a solid foundation for us to build on." **Scottish Government**

we learnt

- The role of funders is only a small part of Scottish Government officials' jobs but requires support and resources.
- We drew out three principles that can help officials to get things right around Purpose (of funding), People (getting relationships right) and Processes (including paperwork). We'll do more on this with Scottish Government in the coming year.

working with national commissioners

We facilitated the Scottish Government group on third sector data to agree its work plan. We worked with other national partners on evidence use.

we learnt

- We need to ally with others to advance change about the use of third sector data and evidence.

"It is great to have an outcomes based SLA and to be able to pick the outcomes that are right for my project. … [the new reporting template] is a great improvement"
Louise Andrée, Fife Befriending Project Co-ordinator, LEAD Scotland

working with local commissioners

This year Scottish Government provided further funding to continue Threading the Needle (TTN) in Fife, and Perth and Kinross Health and Social Care Partnerships. TTN is about using third sector evidence for better commissioning and improved outcomes.

In Perth and Kinross we attempted to support a pilot project to integrate third sector data with NHS statistics but participants came up against workload and protocol barriers.

Success came from supporting the commissioning team and third sector to understand about setting and reporting on mental health outcomes. A key area of learning was agreeing "service level outcomes" for services to report against (rather than high level strategic outcomes).

"Following on from this project, it will also potentially help the CT and the TSI better align our collective support for the third sector around monitoring and evaluation. While we didn't achieve all that we set out to achieve, I think the 'dynamic' nature of how the project has evolved around the CT's and third sector's journey has enabled it to stay relevant, timely and impactful."
Helen MacKinnon, Perth & Kinross Association of Voluntary Service

In Fife we

- Worked with public and third sector partners to revise the Service Level Agreement (SLA) format to include the outcomes agreed in the first phase of the project.
- Ran sessions to support befriending services review their evidence gathering processes and a session with all partners.

Making a difference to the use of third sector evidence is slow but our legacy is that we have put better structures in place.

we learnt

- Commissioners are open to revising outdated reporting guidance in line with Harmonising Reporting and quickly see the benefits.
- It's difficult to use big data without local understanding and knowledge.
- Sharing evidence when both third sector organisations and funders are present can be a very powerful way of generating learning, but needs sensitive facilitation.

OUR RELATIONSHIP WITH ACADEMICS

ESS convenes the Third Sector Research Forum that brings together third sector, academics and others to promote and share research from and about the third sector to improve policy and practice.

In 2017 we

- Delivered, and wrote a report on, the fourth 'Let's collaborate' event: 'Researching Together' attended by 100 participants.
- Produced an infographic about the challenges for third sector organisations to publish their research or practice learning in academic peer-reviewed journals: 'To publish or not to publish?'
- Undertook research about funding for academic and third sector research collaborations.

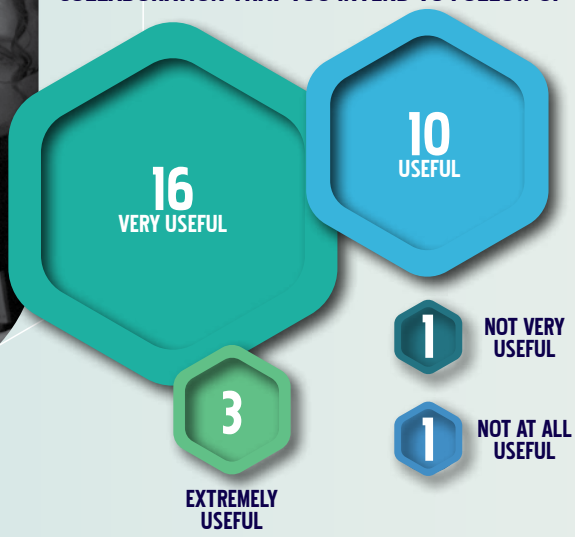
feedback from researching together

"Many thanks for hosting the conference – it was an excellent opportunity to make connections and to reflect on our own third sector and academic partnerships."
Susan Hunter, YouthLink Scotland

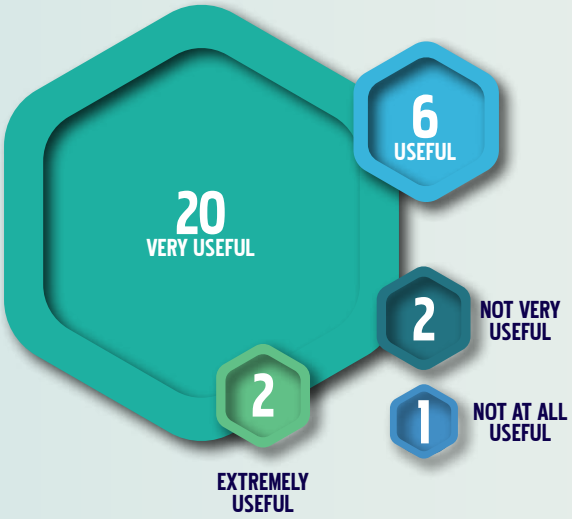
"It was a really great day. I think the balance of attendees from different organisations really made a difference to the discussions. And the number of times collaborators said 'it just started with a chat' really underlines how important these opportunities are."
Louise Meikleham, Scottish Charity Regulator

WHAT PARTICIPANTS FOUND THE CONFERENCE USEFUL FOR:

SPARKING THOUGHTS ABOUT RESEARCH OR COLLABORATION THAT YOU INTEND TO FOLLOW UP



LEARNING ABOUT THIRD SECTOR & UNIVERSITY RESEARCH COLLABORATION



NETWORKING

Source: Follow up feedback from 31 responses

OUR RELATIONSHIP WITH OTHERS INTERESTED IN THIRD SECTOR EVIDENCE

We work with many partners to share learning from and about third sector evaluation including the Scottish Government Public Service Reform programme, the revised National Performance Framework and What Works Scotland. We shared learning with Scottish Charity Regulator about good practice in reporting.

We promoted

- 'Charting the waters' – a guide to evaluating policy influencing.
- Our resource on Asset-based approaches and evaluating prevention.
- Wrote a blog for Scottish Co-production week that led to an event (in April 2018).

Feedback about our Asset-based resource

"Thanks very much for this – a super useful resource! I will share with my Evaluation Team colleagues as this really chimes with some of the changes in thinking and approaches to evaluation that we're trying to move towards here."
Rowan Boase, Big Lottery Fund

ESS LEARNING ABOUT FUNDER AND FUNDED RELATIONSHIPS

During our work this year we have learnt much about funder and funded relationships. Here are a few key learning points:

- Funders want to know their funding makes a difference and are also interested in third sector learning. Funders want third sector organisations to be successful and occasionally fund evaluation support for third sector organisations that were not successful in securing funding.
- Funders should learn on their own when they need a safe space to troubleshoot and get peer support. But it is better to learn with funded organisations for mutual understanding and to produce materials that will affect funded organisations.
- Increased face-to-face contact between funders and funded (particularly with a broker in the room) helps to break down barriers and leads to evidence and learning being shared more openly.
- Involving funded organisations in the revision and development of funders' forms can help funders understand what evidence organisations are keen to share and help organisations understand what evidence funders need, and how it is used. However, this can feel like a very new way of working.
- Funders that genuinely see funded projects as the experts on the ground and work with them as partners can gather powerful learning and real life examples of what works. This can help both funders and funded to share learning from evaluation more widely and potentially be in a strong position to influence practice and policy.

"The 'Get Going' team truly embraced their evaluation training and took the very brave step of ripping up their lengthy pre and post questionnaires to try a new short survey that participants complete in their final 'Get Going' sessions. The new survey was quick and easy for families to complete, gave instructors more time to focus on supporting individual families and provided some fantastic responses that demonstrate the difference 'Get Going' makes to local families."

Edinburgh Leisure
The Biggest Club in Town

EDINBURGH LEISURE CASE STUDY

improving practitioners' ability to evaluate their projects and show the difference they make

Edinburgh Leisure's Active Communities team provides a range of health and physical activity programmes to help people in Edinburgh lead more active healthy lives. During 2017/18 Edinburgh Leisure staff attended our 'Let's evaluate!' workshops and tailored support sessions.

Zoé Mobey, Head of Funding & Evaluation, told us about our impact on their 'Get Going' programme, which helps children and their families get active, eat well and achieve a healthy weight.

The new process has been shared with the project funder, NHS Lothian, who are now rolling this out to other 'Get Going' project teams across the Lothians.

DUNDEE UNITED COMMUNITY TRUST CASE STUDY

importance of developing a viable monitoring and evaluation plan

Dundee United Community Trust was referred by a funder after their funding bid was declined. They had difficulty articulating outcomes and were 'struggling' with evaluation. Head of Operations, Jamie Kirk, identified their goal as *'To make sure that we are delivering the right type of activities to meet our objectives as a charity; to be able to clearly understand the areas in which we make an impact'.*

ESS supported Dundee United Community Trust to develop a Monitoring and Evaluation Plan for their 'Tiny Tangerines' project.

"The tailored session was really helpful in helping us achieve our goal. As an organisation we are much more evaluation focused and I feel that we have the tools now at our disposal to make good decisions on what to evaluate and how to evaluate."

EXTRACT FROM MONITORING AND EVALUATION PLAN: TINY TANGERINES

outcome	indicators	methods	responsible	due date
CHILDREN AGED 2-4 IMPROVE PHYSICAL LITERACY SKILLS	ABILITY TO PERFORM FUNDAMENTAL MOTOR SKILLS SUCH AS RUNNING & JUMPING	SESSION OBSERVATIONS FEEDBACK SURVEY	COACHES PARENTS	ONGOING DEC 17 & JUNE 18
	ABILITY TO PERFORM BASIC SKILLS SUCH AS THROWING & CATCHING	SESSION OBSERVATIONS FEEDBACK SURVEY	COACHES PARENTS	ONGOING DEC 17 & JUNE 18

OUR PEOPLE IN 2017/2018

Trustees

Jennifer Wallace, Convenor
Lindsay Robertson, Treasurer
Andrew Fleming
Diarmid Hearns
Susan Lowes
Dr Joanne McLean
Janet Morton
Professor Stephen Platt
Linda Rodgers
Stephanie Rose
Diana Wilkinson

Stood down

Lynne Irons
Dr Anita Morrison
Derek Young

Staff

Steven Marwick (Director)
Diane Kennedy (Depute Director)
Martha Lester-Cribb (Senior Evaluation Support Manager)
Nicola Swan (Evaluation Support Manager)
Lydia Morrow (Finance and Business Manager)
Shona Wells (Training Officer)
Grace Robertson (Training Officer)
Louise Bowen (Knowledge and Networks Officer)
Jane Marryat (Research and Communications Officer)
Wing Yen Yip (Workshops and Office Administrator)

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**

September 2018

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