

FLEXIBLE AND ADAPTABLE: MEETING THE EVALUATION NEEDS OF THIRD SECTOR AND FUNDERS

ACTIVITIES AND IMPACT REPORT 2019/2020



es Evaluation
Support
Scotland

FLEXIBILITY SUMS UP ESS THIS YEAR!

As a small team of ten, we work flexibly and tailor our evaluation support to meet the needs of each organisation we work with. It is important to us that we enable all third sector organisations to measure their impact and show the difference they make whatever their size or initial understanding of evaluation. We learn from feedback we gather and use that to improve our services.

In this annual report for 2019/2020 we show you how we work with a range of third sector organisations and funders to overcome their barriers to improve their evaluation. We illustrate our work with case studies. This year we are highlighting how we've had to be flexible to support organisations with specific needs and organisations that themselves address inequalities.

We have adapted the way we deliver our workshops and tailored support. We've widened our reach by offering workshops in more locations across Scotland. We delivered more online services such as webinars. We brought funders and funded organisations together to share and learn. We worked with those supporting other third sector organisations in their locality. We worked with Scottish Government to understand the role of the third sector in meeting the needs of Scotland's people. We ended the year facing, arguably, the biggest challenge for us. Like many others we are currently working from home and delivering our services online due to the Covid-19 pandemic.

In 2018/19 we adopted a new strategic plan. On page 14 we showcase our learning so far on our strategic priorities.

OVERVIEW OF OUR ACTIVITIES IN 2019/2020

618

ORGANISATIONS WE'VE
WORKED WITH

542

(88%) were third sector
organisations

76

(12%) were funders and
public sector

1255

PEOPLE WE
WORKED WITH

87

were involved in a
learning set

59

were involved in forums¹

80

WE DELIVERED:
workshops and
events²

112

tailored support
sessions

WE WORKED WITH ORGANISATIONS IN EVERY LOCAL AUTHORITY IN SCOTLAND

¹ Third Sector Research Forum, Knowledge Translation Network, Evaluation Support Account funder

² Due to Covid-19 restrictions we cancelled face to face workshops, events and tailored support planned for March.

OVERVIEW OF OUR IMPACT

"We now understand the power of evaluation. We are more aware of how to do it properly. We involve everyone in the process, and we are seeing real results. Our output from evaluation is helping us to make real improvements in our service to our service users." **Cumbernauld Action Care for the Elderly**

"We have completely changed how we evaluate the work we do and believe this will help us prove the work we do, works. The whole training and support has been great (though we are still implementing it all!)." **David Brackenridge, Venture Scotland**

WE DO WELL

Peer support

"Very helpful, clear, good to hear colleagues sharing challenges. Safe space to peer support. Great that there are actual tools and guidance to use and share." **Scottish Government**

Our resources

"I am using the resources to develop a new evaluation with people with lived experience of mental health and visiting support."

Our communications

"The @EvalSupScot's 2019 Winter Newsletter has some great tips on evaluation and links to some free resources! We really enjoyed their Webinar 'Help! I've got stuck with my evaluation', worth a look." **Esmée Fairbairn Foundation**

Our workshops

"Presentation, content tone and learning environment created were excellent - motivational, clear, practical and supportive." **Reel People**

Our tailored support

"Your thoughtful, considered and knowledgeable approach - critical and expert friend - was exactly the kind of support needed to develop our theory of change and impact approach and I am really happy with the end result." **Lindsay Wake, Social Investment Scotland**



Events and conferences

"As one of only two researchers in my organisation, it's always great to have an opportunity to meet with other researchers from academia and other third sector organisations. It was a great opportunity to make connections, share practice and get some new, creative ideas!" **Feedback from TSRF conference**

"Table discussions really interesting and useful - diverse organisations and experience round table. Felt very constructive." **Feedback from Scottish Government National Performance Framework event**

WE COULD DO BETTER

It can be challenging to manage the time it takes to support organisations' understanding of evaluation principles and how these apply to their work.

SUPPORTING THIRD SECTOR ORGANISATIONS TO EVALUATE

WE DELIVERED

49

'LET'S EVALUATE!'
WORKSHOPS attended by
542 participants from
462 organisations

1

'STATS AND STORIES'
WORKSHOP

for Scottish Mentoring Network
at their annual conference
attended by 16 people

1

'NOT JUST A STORY'
WORKSHOP

about using service user
experiences in evaluation

112

TAILORED SUPPORT
SESSIONS

for 94 organisations

3

WEBINARS

'Stats and stories', 'Outcomes
everywhere but which are mine?'
and 'Help, I've got stuck with my
evaluation!'

2

INSPIRING IMPACT
peer learning events

8

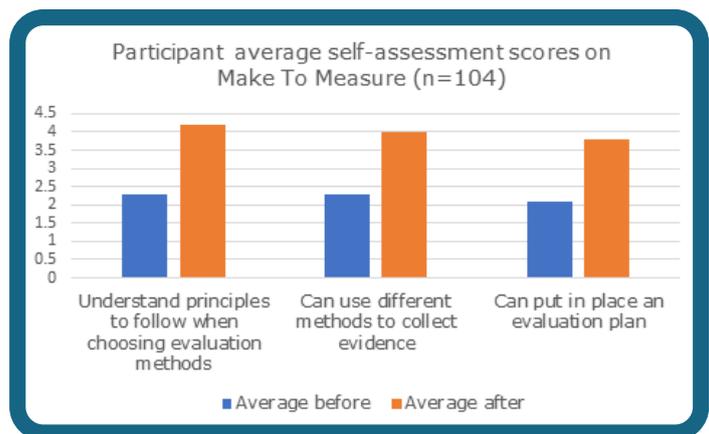
ORGANISATIONS
have completed our workbooks

The main ways we deliver evaluation support are through workshops and webinars, tailored support, online resources, and peer support events. This year we have focused on extending our reach and modes of delivery and improved our accessibility.

WORKSHOPS

'Let's Evaluate!' workshops

This year we more than doubled the number of 'Let's Evaluate!' workshops and the vast majority of participants increased their evaluation knowledge as exemplified in the chart below.



"Now I can tell the [project's] story with relevant information. This informative workshop really helped me understand what I need to do now with regards to writing the exit report." *Carol MacKay, Deaf Action*

Feedback from 'Not Just a Story'

"I plan to use the ideas and knowledge gained to make better use of stories. Particularly analysing, theming and demonstrating impact." *Claire Finlayson, Bowel Cancer UK*

CASE STUDY

Angus Greenshields, Dundee Social Enterprise Network attended a 'Let's Evaluate!' workshop and told us

"I am a development officer for a network of some 70 organisations. A common ask from these members is better understanding of evaluation and I feel that the 'Let's Evaluate!' programme could better equip me to give initial guidance."

After the workshop, he said it had been

"Informative and enjoyable. Helped me to review and reconsider evaluation and how we can do it much better."

and said he planned to

"Review the outcomes and indicators that we currently use and see how meaningful they are."

Extending our reach and ways of delivering our services

OUT AND ABOUT

- We've delivered 'Let's Evaluate!' in Aberdeen, Dundee, Edinburgh, Glasgow, and Perth. Workshops in Stirling were cancelled due to the Covid-19 pandemic.
- We've supported organisations based in every local authority in Scotland.

DIFFERENT FORMATS

- We've delivered webinars and increased our range of 'Explaining Evaluation' short videos.
- We revised our workbooks which can be used as a stand alone resource or in conjunction with tailored support.

Our commitment to improving our support to all

MORE ACCESSIBLE

In order to improve the accessibility of our workshops, we revised our accessibility policy and practices. We created some 'Accessibility Golden Rules' and tested them out to make sure our support is accessible to all. See 'Getting it right for everyone' blog [here](#).



TAILORED SUPPORT

By its very nature tailored support means ESS can meet specific needs of an organisation. Examples of this might mean delivering our services out of traditional work hours, as in the case of our support to Girlguiding Scotland, or planning for more time per session to work through interpreters with an organisation working with the deaf community.



"Thanks again for a great session on Saturday. You have certainly given us lots to think about. I thought your session was excellent and gave us a great grounding to enable us to take forward." Carol Morwood, Girlguiding Scotland



CASE STUDY

We worked with Girlguiding Scotland to review their evaluation plans across the organisation at a more strategic level and help alleviate their concern of individual projects evaluating 'in isolation'. We delivered a tailored support session on a Saturday, which is not usually a working day for us, for 8 participants.

THE DIFFERENCE ESS MADE

The mode of delivery – a mix of workshop and tailored support at a suitable time when volunteers were available – increased understanding of evaluation and the opportunity to embed evaluation across the organisation.

[See the full case study on our website.](#)



ONLINE SUPPORT

Our webinars and short videos prove very popular as do our free website resources.



I can really recommend the resources on @EvalSupScot website - lots of case studies, templates & help to create products which will allow you to plan your project & evaluate your impact - Cara Jones, April 2019, – via Twitter



ScotGovID
@ScotGovID

Great video from @EvalSupScot their evaluation planning template is a great resource!

Our '[Evaluation methods and tools](#)' webpage is the most popular page. It was viewed almost 35,000 times in 2019/2020 and '[Stats and Stories in community settings – a guide to blending different types of evidence in evaluation reports](#)' was the most downloaded resource (354 times).

PEER LEARNING

Our peer learning sessions enable people from third sector and funders to come together to share ideas and resources on evaluation, celebrate success, and tackle barriers and challenges in evaluation.

As an Inspiring Impact partner, we ran 2 events:

- ‘Shelving it!’ - Data storage
- ‘Help! I’ve got stuck with my evaluation!’

The third event was postponed due to lockdown.



Feedback from ‘Help I’ve got stuck...’

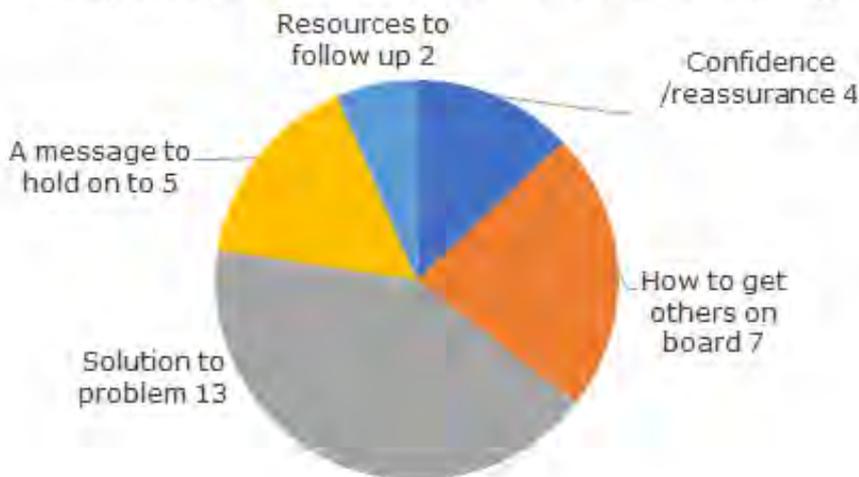


A really excellent, thorough and well-thought out morning ... All the exercises built incrementally on one another in a clear and structured way.



Impact of ‘Help I’ve got stuck...’

What participants are taking away (21 participants – some said more than one thing)



A participant said they were taking away...



Practical tips and suggestions for unpacking sometimes complex and seemingly impenetrable evaluation problems - making them easier to break down into strands that are easier to address.



ADAPTING TO DIFFERENT LEARNING STYLES

- We trialled different models of action learning which has solidified into a “solutions sounding board” model.
- We have gathered key insights about peer learning. [See page 14.](#)



FUNDERS AND FUNDED WORKING TOGETHER



EVALUATION SUPPORT ACCOUNTS

Our Evaluation Support Accounts offer evaluation support to third sector organisations paid for by their funder. We have 4 main ESAs to support smaller organisations who can't afford to commission support. We have supported 140 grantholders through our partnerships with:

- National Lottery Community Fund (NLCF)
- The Robertson Trust
- RS Macdonald Charitable Trust
- Corra Foundation

The following examples show the range and impact of support given to third sector organisations through ESAs.



Supported by NCLF ESA:



"We had no formal evaluation processes and as a result of the support we received from ESS we now collect and set appropriate data and analyse the results for future activities. The support was very easy to understand and was thoroughly enjoyed by the staff." Jacqueline Stewart and Clare Carmichael, Barmulloch Community Development Company



"I have already created an outcomes and indicators document from the last training day and now I feel confident to add methods to measure. This has really motivated and inspired me to get the right evaluation methods for my organisation." Rob Burns, Options in Life



THE
RS MACDONALD
CHARITABLE TRUST

Scottish Ballet funded by RS Macdonald ESA said after their tailored support session:



"The session has definitely made a difference to us, if anything, just a shared language and understanding of the importance to get it right at the start of a project. I listened to Stats and Stories too [a webinar on the ESS website], that was helpful." Sarah Potter, Scottish Ballet

FUNDERS AND FUNDED WORKING TOGETHER



Through The Robertson Trust ESA we supported Youth Theatre Arts Scotland (YTAS) to develop a logic model for all their services that links their outcomes to the National Performance Framework. YTAS wrote a case study that has been published on the [Scottish Government website](#).

“It has encouraged us to think about the elements we have both control and influence over. It has increased our confidence about why we evaluate, and it has led to a (still evolving) evaluation plan / cycle. We thought the ESS staff and resources were always refreshingly clear. Sadly, not always something you experience in day-to-day work!! Thanks so much, you guys are fab!” **Kenny McGlashan, YTAS**



CORRA
FOUNDATION

Supported by Corra ESA staff from Ponies Help Children attended workshops followed by a tailored support session on methods and tools, and reporting. The organisation was using a scaled questionnaire to collect evidence but wanted to make more use of the comments and stories they heard from children and parents; what they called their golden moments. We explored some creative and more casual ways of capturing these, such as a story wall in their tea cabin, as well as involving the team by building in some specific evaluation questions at their de-brief sessions.

“We found the workshops very helpful and I am able to implement them into my funding applications now!” **Heather Stephens, Ponies Help Children**

SUPPORTING FUNDERS TO LEARN HOW TO EVALUATE

We delivered a 'Getting the Best from Your Grantholders' workshop to support funders.

“

"Really found the 'getting the reporting relationship right' handout helpful to use as a basis to improve what I am already delivering. Thank you!" Fiona Inglis, Impact Funding Partners

FUNDER AND FUNDED LEARNING TOGETHER

To support funders to learn together with funded organisations and find alternative ways to report and generate collective learning we ran three events:

- Tackling homelessness - As part of the NLCF ESA, NLCF-funded homelessness projects and NLCF staff came together to share learning about tackling homelessness.

“

"Bringing projects together – feels like we are part of something new and exciting." Participant

- 'Getting My Report Right' - This session enabled NLCF grantholders to learn from each other and the funder to make their reports more useful.
- 'How's it Going?' - Brought together organisations referred by both NCLF and The Robertson Trust, and funders themselves to share what organisations had learned about evaluating. [Key messages are on our website.](#)

A DIFFERENT WAY TO REPORT

Commissioned by The Health and Social Care ALLIANCE we delivered three learning events to explore how to report third sector learning from projects funded by Health and Social Care ALLIANCE's self-management fund. This successfully created an alternative reporting method to written reports.



“

"Views gathered from this round of funded projects will directly inform the design of the next round of the fund." Lara Murray, The ALLIANCE

“

"I would say we have learnt more and achieved more." Sarah Clearly, Volunteer Edinburgh

See ['How was it for you?'](#) to discover more about the impact of changing the way third sector organisations report to their funder.

SCOTTISH GOVERNMENT AS FUNDER

As a result of the workshop one official told us:

We work with Scottish Government to support their role as funder of third sector projects. We delivered our 'Funding and Relationships' workshop 4 times for 47 SG grant managers.

“

“I will be reviewing processes and questioning how to approach funding in the future. Good course – gives enough space to think. Great trainer.”

PRINCIPLES FOR POSITIVE PARTNERSHIP

We ran a consultation on '[Principles for Positive Partnership](#)' – practical guidance for Scottish Government fund managers that we had developed last year. Following a revision of the document it was launched in January 2020 at a SG event attended by 57 grantholders and grant managers. We also convened a meeting of 4 funders who distribute SG funds.

At the launch participants said they would:

- Commit to sharing the guidance with colleagues
- Some third sector grantholders will discuss it with their grant manager:

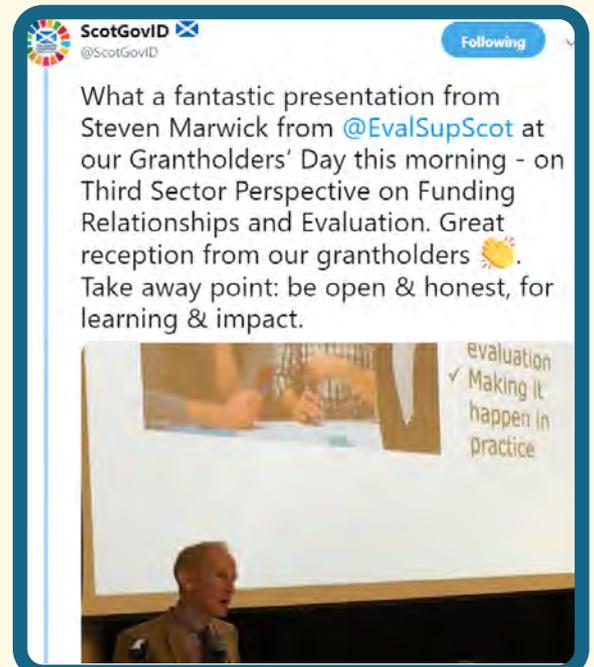
“

“Have arranged coffee with policy lead of my area to discuss what I've learned and share ideas for improvement - right now!”

- And some SG grant managers planned to share it with their grant holders:

“

“Introduce it to our network (funded organisations) and discuss with them at next network event.”



DEMONSTRATING IMPACT ON HEALTH INEQUALITIES



We developed a model to show the third sector's contribution to tackling health inequalities. This work was funded by NHS Health Scotland, Community Health Exchange and Voluntary Health Scotland were key partners.

We facilitated a learning set of 6 third sector organisations and 2 commissioners and developed '[Recognising our rich tapestry: measuring the contribution of third sector organisations to tackling health inequalities](#)'.

At its launch at the Gathering 2020, participants said they felt the model would support them to show impact on preventing or mitigating the effects of inequalities.

"The work our organisation does has a considerable impact on health inequalities. However, we need to formalise our evaluation in this respect. The model is an excellent tool to assist us in this."

"This model can help us justify to funders why we focus on the individual's wider wellbeing, rather than only medical outcomes." Ruth McKenna, Waverley Care

YOUNG PEOPLE IN THE LEAD OF EVALUATION



Ten youthwork organisations took part in the second year of this programme (funded by The National Lottery Community Fund) to explore how young people can take a lead on evaluation. Four case studies were created to show the impact of this work and coproduced key messages.

We increased the knowledge of third sector organisations working with young people about how to involve young people in evaluation beyond giving feedback, and to boost the organisations' confidence to allow this.

"It helped to have open dialogue and make time for evaluation, so that everyone feels included." Jasmine Dey, Youth Engagement Worker, Beatroute Arts

YoMo Health Champions Programme involved young people in creating an evaluation plan for a youth-led workshop on positive mental health. The learning is now filtering throughout the organisation. Caitlin McGlynn, the Youth Worker said:

"We were surprised that the young people embraced evaluation. Staff have been really inspired by this and as a result we have revamped our young leaders programme, so the young leaders are now planning evaluation for different YoMo projects."

[Read YoMo case study for more information](#)

We also ran a workshop about putting young people in the lead of evaluation for 11 Listening Fund projects.

"[I'm taking away] A richer understanding of the benefits of involving young people in evaluation. A good idea of how to do it in my own organisation."

THRIVE LEARNING PROGRAMME

Commissioned by Spirit of 2012 we partnered with Actify to pilot the 'Thrive Learning programme' for organisations that improve access to sport and physical activity. We began to roll out the programme from January 2020.

“I'm often guilty of establishing programmes and measuring success purely on attendances. I think outcomes can support a much wider process of evaluation.”



SUPPORTING THE SUPPORTERS – THIRD SECTOR INTERFACES (TSIs)

We worked with third sector interfaces (TSIs) to help them evaluate and report on their complex work. We ran 'Let's Evaluate!' workshops for 26 people from 23 TSIs. In follow up feedback 8 people (30%) said they had shared learning with colleagues and planned evaluation into new projects.

“We took the learning from all 3 workshops and shared within our organisation to review our current workplan and produce a much improved plan.”

We also ran a learning event, attended by 17 TSIs about linking TSIs' work to the Scottish Government National Performance Framework.

WORKING IN PARTNERSHIP TO SUPPORT THE USE OF THIRD SECTOR EVIDENCE

- This year we ran an event for 26 people about what the Scottish Government National Performance Framework means for the third sector. We developed case studies with Befriending Networks, Scottish SPCA, Youth Theatre Arts Scotland, about how they have used the National Performance Framework (NPF) in their work.
- Our blog 'Were we wrong to talk about outcomes' provoked positive interest and support.

“Brilliant article from @EvalSupScot on the importance of understanding outcomes.” Tweet from Shubhanna Hussain-Ahmed, Coalition of Carers

- We worked with Scottish Council for Voluntary Organisations (SCVO) and Scottish Charity Regulator (OSCR) to promote and support Trustee Annual Reporting including at an event at the Gathering in February 2020.



TSRF THIRD SECTOR RESEARCH FORUM

Funded by Scottish Government Third Sector Unit we convene The Third Sector Research Forum which promotes and shares good practice on third sector research. The forum has 24 members. Activities this year include a conference, a guide to looking for funding for third sector collaborative research, and creating a 'Find an academic partner' webpage.

Members tell us they benefit from the 'mutual support' that the Forum offers.

“It's given me links to other organisations ... which has led to some collaborations that wouldn't have happened without this group.”

Impact of the TSRF conference:

- 72% made connections at the conference or gained ideas
- 69% know more about different types of research impact

“When I next apply for funding for research, I'm going to approach a third sector or public sector organisation to partner with first to ensure their needs are incorporated from start and all the way through”

“I learned more about creative ways of utilising lived experience to achieve change and how best to collaborate with public sector partners”

ESS LEARNING PRIORITIES

In our Strategic Plan 2019-23 we have set out 8 priorities about what we want to learn. We thought we'd update you on our progress after one year.

OUR LEARNING THIS YEAR

WHAT IS 'ADVANCED' SUPPORT?

We found this is hard to pin down because "advanced" means different things for different organisations. For some it may mean 'more sophisticated' whilst to others it means 'they want to be better' depending on their current evaluation practice. Our learning: We have developed resources about complex evaluation challenges, and we have also improved our diagnosis to support our clients to be clearer about what they need.

HOW TO EMBED EVALUATION

Embedding means evaluation is part of everyday work. We've learned about how to help organisations take simple embedding steps. We've added a [webinar](#) on "getting unstuck", an [infographic](#) on getting others on board and [created and used messages](#) from grantholders for grantholders.

HOW TO HELP ORGANISATIONS DETERMINE IF THEIR EVIDENCE IS GOOD ENOUGH

We've learned that the key to good enough evidence is driven by the question "what do you need your evidence for?" and so is it good enough for that purpose? We will be testing out a new resource in the coming year.

HOW DOES PEER LEARNING SUPPORT EVALUATION?

We've concluded that peer learning works well with an adaptive challenge topic and helps people work through their issue, reassures that they are not alone with a problem, and generates practical solutions.

HOW TO WORK WITH FUNDERS AND FUNDED TOGETHER TO SHARE LEARNING AND USE EVIDENCE and HOW TO CREATE AND SUPPORT SITUATIONS FOR PEOPLE TO BE MORE HONEST ABOUT WHAT DOESN'T WORK.

We've developed an effective "learning event" model for projects with something in common, that generates strong impact and learning evidence and reduces the sense of competition. In relation to sharing what didn't work, one insight is that it is easier to share a problem after you have fixed it.

HOW TO INVOLVE SERVICE USERS IN EVALUATION

We need to keep reminding organisations that involving service users goes beyond asking for their feedback. Where organisations have the confidence to give control to service users to design evaluation it works well. We have [case study examples](#) of involving young people at every stage in the pathway.

THE ROLE OF TRUSTEES AND VOLUNTEERS IN EVALUATION

As a way of testing, we are involving our own trustees in developing the Annual Trustees Report and we are planning to launch a trustees' webpage in Trustees Week in November 2020.



COPING WITH COVID-19

EVALUATING AT A DISTANCE

From March 2020 due to the Covid-19 pandemic, we found ourselves, like so many others, working from home and delivering our services online.

Our initial step was to think about what third sector organisations would need to know about evaluating in this crisis. We developed key messages (see image on top right of this page) and resources to respond, such as [‘Using contact forms to gather evidence during a call’](#), [‘Method sheet: Taking stock in time of change’](#) and [‘Method sheet: Using social media to evaluate other activities’](#). We set up a [Covid-19 webpage](#) so that organisations could quickly see new resources and events, which we continue to update. We communicated with our service users via [e-bulletins](#) and through [social media](#).

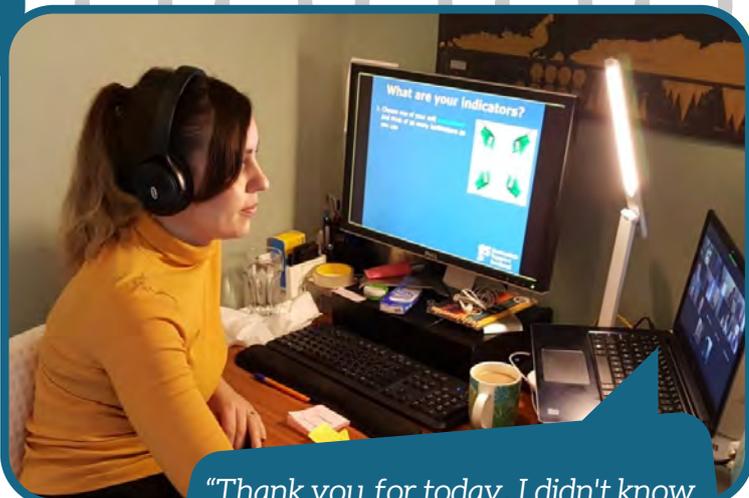
EVALUATING AT A DISTANCE
#IsolationEvaluation

ESS Evaluation Support Scotland

In these tough times remember to
Keep your evaluation simple
Celebrate your successes
Record your learning

Our top message - Find quick and easy ways to record

- What you do
- Who with or for
- The difference you are making
- What you're learning



"Thank you for today, I didn't know how I felt about learning online but it worked really well"

ONLINE DELIVERY

We learnt a lot in a very short period of time about how to deliver our [‘Let’s Evaluate!’](#) workshops via video conferencing. In this [blog](#), ESS Training Officer Shona Wells talks about how we deliver and evaluate these workshops. We used the feedback to improve our practice and to celebrate success.

We are also delivering our [tailored support sessions](#) on video conferencing, offering shorter sessions to accommodate the different learning experience.



OUR MONEY

INCOME £395,676

EXPENDITURE £396,348

We received grants from the Scottish Government and New Philanthropic Capital (NPC). The rest of our income comes from contracts and fees. Our full [Annual Report and Financial Statement 2019/2020](#) is on our website.

OUR PEOPLE IN 2019/20

TRUSTEES:

Andrew Fleming, Convenor
Janet Morton, Treasurer
Dr Kevin Guyan (Deputy Convenor)
Prof. Karen McArdle (Deputy Convenor)
Kerry Allan
Maxine Dinnes
Diarmid Hearn
Alex Johnston
Jacqueline Killeen
Dr Joanne McLean

Stood down:

Professor Stephen Platt (Convenor)
Lindsay Robertson (Treasurer)
Susan Brown
Stephanie Rose
Linda Rodgers

STAFF:

Steven Marwick (Director)
Diane Kennedy (Depute Director)
Lucy Craig (Finance and Business Manager)
Martha Lester-Cribb (Senior Evaluation Support Manager)
Nicola Swan (Evaluation Support Manager)
Jane Marryat (Research and Communications Manager)
Katrina Macapagal (Communications Assistant)
Grace Robertson (Training Officer)
Shona Wells (Training 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 2020

 **Evaluation
Support
Scotland**

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