



Toolkit for evaluation leaders

An evaluation leader in a third sector organisation is someone who embeds evaluation, makes sure data is collected and that reports are written and uses evaluation for learning, improvement and celebration. The evaluation leader might be a dedicated evaluation role, the chief executive or senior manager, the fundraiser or simply someone with a particular interest.

If you are the evaluation leader in your organisation, this resource is for you! It sets out some key things you need to do as a leader and tips on how to do them.

The resource draws from [research](#) we undertook in in 2020 about [evaluation leadership in the third sector](#). It is a companion resource to [Making it stick - our guide to embedding evaluation](#).

Six things an evaluation leader should do...

1 Enthuse your colleagues and get buy-in

Tips:

- Lead team discussions on what evaluation is and who it's for so colleagues see evaluation as useful and having a purpose.
- Include evaluation as a standing item in team meetings to check evaluation is happening and share results.
- Showcase how evaluation benefits your organisation, for example how it is used in successful funding applications or policy influencing work.
- You don't need to have all the answers. Indeed asking staff for ideas on how to improve evaluation builds ownership. Create a culture of "we're all learning together".

Relevant resources:

[Making It Stick Wheel](#)
[Making it Stick webinar](#)

"You have to spread what's joyful about evaluation ... Evaluation can change the world, but you need to enthuse people."

ESS research interviewee, 2020

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Ensure evaluation findings are used

Tips:

- Share evaluation reports internally and use good news stories from evaluation to celebrate success across teams.
- Run reflective practice sessions to use evaluation directly in day to day practice. Encourage reflection about things that evaluation shows did not go so well. Keep this completely separate from staff appraisals. This is about “no blame” honesty so the organisation can learn and improve.
- Communicate your findings externally through social media, press releases, annual reports, short videos.
- Involve your board to use evaluation to shape decisions about future direction of the organisation. This might be particularly relevant in relation to learning from the Covid-19 crisis. Involve your board in discussions about what adaptations worked well and you might want to hold on to, and what you want to let go of.

Relevant resources:

[ESS Support Guide 4.1: Using what you learn from evaluation](#) – there is an exercise in that guide you could do this exercise with teams.

[Resetting after Covid-19](#) – choose one exercise to do with your board

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Find and use allies in your organisation

While it's good to have an evaluation leader it can be counterproductive if you are seen as the only one with evaluation knowledge. Others will be deskilled or lack confidence that they can do it. Integrating aspects of evaluation use into other roles also creates more champions.

Tips

- If you have communications officer ask them to create case studies, tweet findings or help with report presentation.
- Colleagues who are resistant to evaluation can be allies. They provide insights into what stops evaluation happening (fear or lack of knowledge?, cumbersome systems) and if you can overcome their resistance, they may become your biggest champion.

- Use volunteers. For example one organisation in our leadership research created a designated role for an evaluation volunteer who inputs their evaluation data.
- Service users could even be allies! See our [resources on involving service users in evaluation](#).
- You might not even be the only “evaluation leader” in your organisation. You could set up a “champions” from across different teams.

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Ensure evaluation is valuable and not resource-intensive

Tips

- Shadow frontline workers to understand what evaluation methods fit best into their work.
- Evaluation data is sometimes only in staff member’s heads! Ask them to put in place simple structures to record their observations or service user feedback.
- Put in place evaluation plans so it’s written down what data should be collected and who will do it.
- Encourage staff to think about evaluation when planning a new project. One approach might be to create a logic model. This is a good way of bringing people together to get them on board, understand the logic of a new project and see how realistic the plans are. Will those activities lead to this outcome? A logic model also helps you create an evaluation plan.

Relevant resources:

[1 minute video on evaluation planning](#)

[Evaluation plan template](#)

[Interactive logic model template](#)

Logic modelling [online course](#) and [support guide](#).

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Troubleshoot evaluation challenges

Tips

- If staff are not using the agreed evaluation method or tool, ask them what's getting in the way. They may not understand why it's important to have consistent data. Or they may have other ideas about how to collect and record evidence.
- Don't be afraid to adapt your evaluation tools if they are not working, or not providing the right outcome evidence.
- Sometimes organisations collect data they don't use "just in case". If you are not using the data then it is not good practice to collect it. Open up discussions about what you collect and why with the team.

Relevant resources:

[1 minute video on choosing the right evaluation method](#)

[Support guide on designing evaluation methods](#)

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Managing funder relationships

Tips

- Make sure you know what funders need, even if you are not the person doing the reports, so the evaluation data fits with funder requirements.
- At the same time, be honest with funders if what they are asking for is not proportionate or is not the 'right' question. Offer a solution and show how the funder will get better evidence of impact if they do it your way!
- Ask funders for feedback on what they do with your reports so you can celebrate success and maybe get even better at reporting in future. Funders who give feedback can be a good motivator for staff. It can show staff the connection between evaluation and funding which can encourage more buy-in to evaluation.

Relevant resources:

[Building mutually beneficial relationships – top tips for funded organisations](#)

[Template for what many funders are looking for in reports](#)

And finally ...

See our evaluation leader [person specification](#)

Sign up to [ESS's newsletter](#) and look out for peer learning events where you can swap ideas and experiences with peers. You are not alone!

Contact us for more information about this guide or how Evaluation Support Scotland could support your organisation.

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