



MAKING IT STICK

A guide to embedding evaluation

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About this guide

This guide is for people who have a role in making sure that evaluation is embedded into everyday practice within their organisation.

It's NOT about how to DO evaluation technically. It will not show you how to define your outcomes and indicators, choose methods, or analyse and report on outcome information. For more help on how to DO evaluation go to:

<http://www.evaluationsupportscotland.org.uk/evaluation>

This guide will help you to think about why evaluation is important to your organisation and how to get staff, volunteers and trustees to embed evaluation into your organisation's day-to-day work. In practice that might mean changing the WAY you design and do evaluation technically.

If you want to review your organisation's evaluation strengths and the areas you might want to work on, you should have a look at Inspiring Impact Measuring Up! self-assessment tool:

<http://inspiringimpact.org/measuringup>

This guide is based on

- ESS research into the conditions for successful embedding of evaluation within an organisation¹.
- Specific learning from the organisations we have worked with through our Inspiring Impact Embedding Impact Practice group.

In this guide we use the words "evaluation" and "measuring impact" interchangeably. In both cases we mean assessing the difference you have made through your activities.

¹ Embedding evaluation: Are we nearly there yet? Just a bit further!', ESS, 2014, based on questions in our biennial stakeholder survey and 10 qualitative interviews of organisations, from both third sector and funders, who had received either a small, medium and larger amount of support from us at least two years prior.

Why embed?

Embedding evaluation is about putting impact at the heart of everything you do; it's about your organisation as a whole understanding the benefits of evaluation and impact, collecting useful data routinely and using learning to plan, do, assess and review your work. There are a number of reasons for embedding evaluation into everyday work:

- The organisation as a whole becomes more aware of and more focused on achieving your outcomes
- Evidence collected is used by more people for learning and improving services, not just for reporting to funders
- Evaluation is built in so you're not scrabbling around at the end of a project looking for evidence
- You get better, more consistent data
- You can make better use of the data you collect
- Your evaluation is not driven by funders but by your organisation's need and by learning.

How to use this guide

Section one: 'Embedding evaluation into your organisation's practice' diagnostic wheel

We suggest you use this tool to diagnose your current strengths and areas for improvement. It is deliberately simple and focuses on a few key areas. But we know it can stimulate rich reflection and discussions. We give you an idea for how you can use the wheel to facilitate group discussion.

Section two: Hints and tips to improve each area

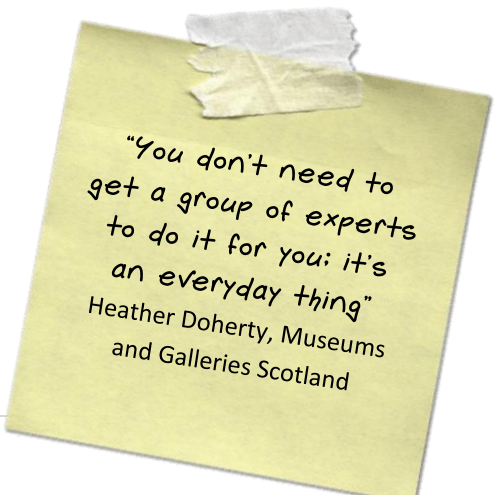
Once you have identified those areas where you want to improve you can go to the relevant section of this document to find hints and tips about:

- Linking evaluation to strategy
- Resourcing evaluation
- Making it happen in practice.

Section three: Action planning

Considers what we've learnt about when to plan change and provides an embedding practice planning checklist. We also provide some simple tools for prioritising and timetabling actions to embed evaluation.

Section four: Other relevant resources



"You don't need to get a group of experts to do it for you; it's an everyday thing"
Heather Doherty, Museums and Galleries Scotland

Section one: Embedding Evaluation into your organisation's practice

Diagnostic wheel

Research carried out by Evaluation Support Scotland (ESS) in 2015 told us that for a third sector organisation to embed evaluation and impact practice it has to commit to:

Linking to strategy

This means that organisational strategy (such as business plans) and your evaluation plan are in tune with each other. It also means ensuring that there is buy-in at senior management and trustee level.

Resourcing evaluation

This means that staff and volunteers have the time, training, support and other resources to do evaluation.

Making it happen in practice

This is about ensuring that everyone else is on board with evaluation and that your plan is practical and realistic.

Our diagnostic wheel is based on asking questions on each of these areas.



How to use the wheel

The wheel can either be used for personal reflection or to promote discussion. Ask yourselves: how well do we score on each of these elements of embedding evaluation into our organisation?

1 = poor and 5 = excellent: Shade in the segments to reflect your performance on each element so you can reflect on which areas you could improve upon?

Each individual shades the segments to reflect their view of where the organisation (or team) is in relation to each statement.

If used for personal reflection

You should be able to see at a glance where the strengths and weaknesses are. Go to section two for ideas to improve your score.

Also think about how you can engage others in making changes. You can't do it alone! See Section three for our learning around when and how to plan change.

If used for group discussion:


To get a view across the group, ask everyone to fill the wheel in individually and then calculate the total score for each area. You can do this by gathering in the wheels or asking people to record their scores on a flipchart or grid (see next page). To see how different opinions are, look for the highest and lowest scores.

From this picture you should be able to see the areas that are perceived to be stronger or weaker. You can also see where there is greatest divergence of opinion.

Then you can choose to discuss:

- The differences of opinion: why does one person/group think the organisation is strong in a particular area and another that it's weak?
- Why you are so strong in that area: what is helping that to work so well?
- What's the current situation in areas where you are collectively scoring low: What's working well? What can we do together to make it better?

If it helps, go to the [Section two](#) for things to think about for each broad area: are any of these helpful for you? What else could you do? You may want to prioritise actions and plan who does what and when. See [Section three](#) for tools to help you to do this.



"We started from the point of view that we're not perfect at all and wanted to give it a real go"

Kathryn Welch
Macrobert Arts Centre

Example scoring table

| Statement | List of individual scores | Average score | Minimum | Maximum |
|--|---------------------------|---------------|---------|---------|
| <i>Linking evaluation to strategy</i> | | | | |
| Project activities and outcomes are linked to our strategic plan | | | | |
| Our trustees are on board with evaluation, enthusiastic and want to know how the organisation benefits our service users | | | | |
| The board receive appropriate evaluation reports and act on them | | | | |
| <i>Resourcing evaluation</i> | | | | |
| All our staff are trained in evaluation and know what is expected of them | | | | |
| Time is given for collecting, reporting and learning from evaluation | | | | |
| There are resources to support evaluation (e.g. ICT, databases or other storage systems, admin support?) | | | | |
| <i>Making it happen in practice</i> | | | | |
| There is leadership for evaluation | | | | |
| We have a realistic evaluation plan that enables staff to gather evidence across the whole organisation | | | | |
| We see the benefits of evaluation and share them across the organisation | | | | |
| Service users appropriately involved | | | | |

Section two: Things to think about Linking to strategy

Embedding evaluation requires organisational change and that means substantial commitment, leadership and buy-in at all levels of the organisation. It's vital to get leaders, senior management and trustees on board.

Trustees and senior staff don't have to be involved with the detailed day to day evaluation and planning of each project or service, but they need to know where project outcomes fit into the broader organisational picture.

It's helpful if organisational strategy (such as business plans) and your evaluation plan are in tune with each other. It's also helpful for the board and senior staff to understand how project impact contributes to the vision of the organisation.

Questions



- Are you using the same words in individual staff plans as in the strategic plan?
- Do you evaluate the strategic plan?
- Does the board know the main outcomes for the organisation and what kinds of evidence you are collecting?
- Does the board have discussions about impact at board meetings?
- Do the board and senior staff ask for evidence of impact and do they use that evidence?
- Do you report to the board about progress on evaluation?

Ideas



When you discuss the strategic plan, review your current services and your outcomes. This will help the board to make strategic decisions about where to put more and less emphasis going forward.

Ask the board or senior managers to identify some broad long term outcomes for your client group or community. Map out how particular projects or services contribute to those services.

Use the code of Good Practice ([See page 16](#)) to check if your strategy is in line with best practice.

Resourcing evaluation

Collecting outcome evidence takes time and effort, even where it fits into everyday work. Staff and volunteers need to know what to collect, when and why? They also need the skills and appropriate resources. This might be a database or simple paperwork or technology.

Evaluation is for everyone, it's not just for reporting to funders, it's also about improving services at all levels of the organisation. It's important to have time to analyse and reflect upon what the information is telling us.

Questions



- Do your staff know the language of evaluation (activities, outcomes, indicators)?
- Do your staff know what information they need to collect, when and why?
- Are you clear who is going to analyse and report on outcome information?
- Does everyone have the skills to do their part?
- Who can answer questions about systems if staff or volunteers get stuck?
- Do you give staff and volunteers sufficient time to record?
- Do staff have easy ways to record the difference they are making (paperwork, database etc.)
- Do you build in time to reflect as a team upon the information you are collecting?

Ideas

Training and ongoing support

- Think about including evaluation in induction for new staff.
- Make it part of someone's role to check that systems are being used as intended, answer queries, give additional support or sort out issues. This could be a manager or champion.
- Refer staff and volunteers (where appropriate) to ESS support guides, resources and workshops.
- Speak to other organisations about how they have embedded evaluation.

Making time

- Build reflection in each delivery sessions with staff or beneficiaries.
- Have evaluation as a standing item in team meetings.
- Include evaluation in all staff paperwork including staff support and supervision /appraisal.
- Build time for evaluation into project plans.

Making it happen in practice

For your plan to happen in practice, in addition to staff being clear and having the resources they need, they also need to be motivated. A number of factors affect that:

- The outcomes and indicators and methods make sense to staff, volunteers and service users
- Having easy to use practical systems that fit into everyday work
- Knowing that the evidence is used
- Finding it useful for their own purposes
- Knowing that it's important and this is recognised.

A sense of importance can come from management, from other team members or from your own mission and motivation for doing the job. Leadership for evaluation can and should be encouraged at all levels. Involving people in developing the evaluation plan can be critical to achieving that.

Questions



- Are staff and volunteers clear about the difference you plan to make and how that fits into the organisations' work overall?
- Do methods for collecting and using information work for everyone?
- What do staff and volunteers think about evaluation in your organisation?
- How do you involve staff and volunteers and service users in planning for and using evaluation information?
- How do you share and use evaluation evidence?

Ideas

Create a sense of ownership

Involve the whole team in discussions around evaluation. Start with your vision and mission. Why do we work here? What gets us out of bed in the morning? Evaluation is about what matters.

At an internal staff event ask staff to think about why evaluation is important, for whom and what gets in the way. Take any concerns seriously.

Involve teams in setting outcomes and indicators. Ask for ideas for how they could collect more or better information about outcomes and what matters. Involve them in making sense of the evidence and reflecting on both the method for collecting information and the findings.

Communicate in different ways to keep the team on board. Consider if face to face is better than email. Do you have an intranet you could use? Celebrate your successes!



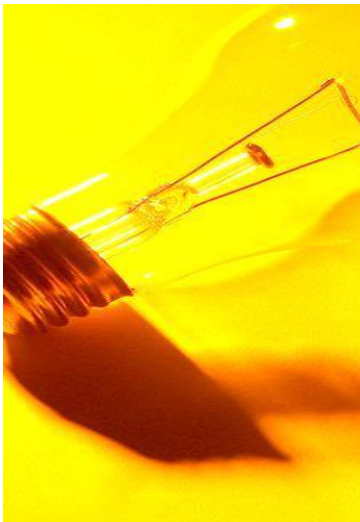
Make sure your plan is realistic

Evaluation is never perfect - go for good enough. Keep it simple, don't have too many outcomes or indicators. Concentrate on the most important / relevant / easy to measure. You don't need to evaluate everything all the time.

Make the method fit the context (so 'on the move': use a notebook, tablet or phone; 'time poor': develop quick and easy methods such as a show of hands). Also make use of information you already have or use existing data collection points (e.g. referral, assessment and review paperwork).

Regularly review your plan to ensure its still fit for purpose.

"Everyone has a value to add"
Stuart Cable, Queen Margaret University/NHS Education for Scotland



Communicate results and show how you have used them

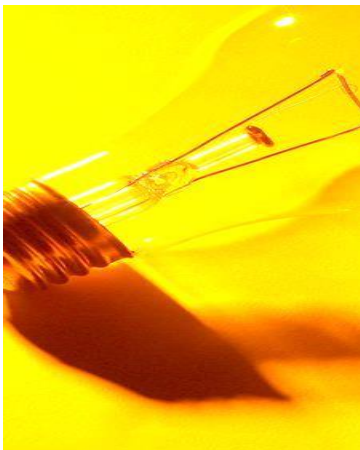
Share good stories "we used evaluation to get more funding" "I was with the Minister and it was great to be able to provide X evidence".

Feedback to service users / the people you work with.

Put feedback on a wall so everyone can read it.

Report to your board and ask for feedback.

Showcase your impact in your annual report and on your website.



Involve service users (the people you work with)

Ask your service users for ideas for how they could collect more or better information about outcomes and what matters to them.

Don't impose tools from above.

Test methods: Try a simple method or small sample, ask beneficiaries how was it for them.

Sense check analysis or results with beneficiaries.

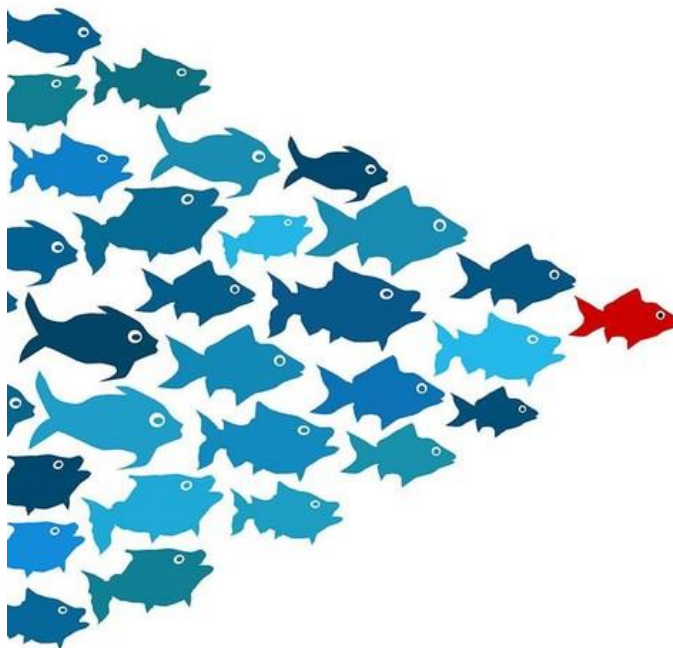
Make it fun and relevant.

Section 3: Action planning

This section sets out what we've learned about how to plan change and includes some action planning tools.

Leadership is important

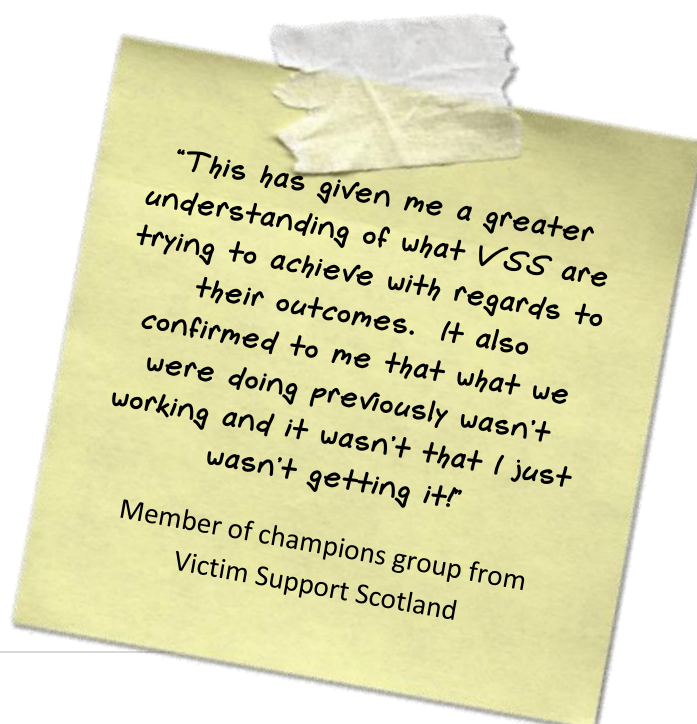
Leadership is important in general for creating the right culture for evaluation. If you are thinking about embedding practice you need to think about who is leading this process and with what authority. You also need to think about how you are going to involve people at all levels of the organisation.



Involving front line staff is helpful

This helps to get people on board and more willing to use any new systems, but it also helps to improve those systems because it takes account of the everyday realities of the work and helps staff to share their understanding of what outcomes look like in practice.

Creating a champions group (including front line staff) to direct changes can be powerful. The group can collectively complete the wheel (see page 5), agree priorities for action and test out new approaches with other staff, volunteers and service users.



It takes time

Embedding evaluation and impact practice can be a complex process that requires changing attitudes and the way people work together as well as changes to evaluation collection and reporting systems. That takes time, not least because it requires buy-in at different levels of the organisation. We've learnt that it's helpful to accept that you can't change everything all at once and to break your actions into smaller steps and do lots of small things over time.



"Embedding impact practice takes time and lots of patience: knowing where change and improvement that can be made, but you have to give yourself time to get there"

Conclusion from Embedding Impact Practice Learning Exchange session.

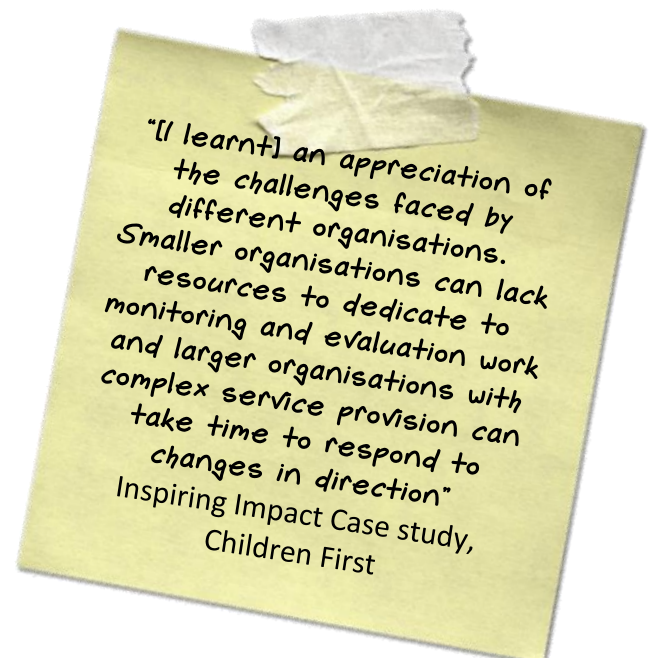
Pilot and review your changes

Not everything is going to work first time, so be ready to change your approach and try something different. This means taking a 'no blame' approach and encouraging people that 'learning' not 'perfection' is the most important thing.

"Embedding impact practice and evaluation is about always looking at what you are doing. It's a cycle you should be on all the time." Circle ([See Circle case study](#))

Each organisation is different

Each organisation faces different challenges because of the work they do, the size of the organisation and the people within that organisation. There is no one right way to go about making change and embedding evaluation.



It's important to get the timing right

It's not helpful to start this process when other big changes are happening, for example where there is a staff restructuring.

It can help to think about reviewing your evaluation at the same time you are reviewing your strategic plan. It helps to ensure that similar language is used and that outcomes and activities are reviewed in the light of your strategic vision.

If you don't want to be led by technology, develop your evaluation plan and paperwork before you start designing and changing your database.

Creating your plan for change

Here we have created a checklist for you to start your planning. We hope it's useful to think through your overall strategy. On the next page we identify some **action planning tools for prioritising and timetabling actions**.

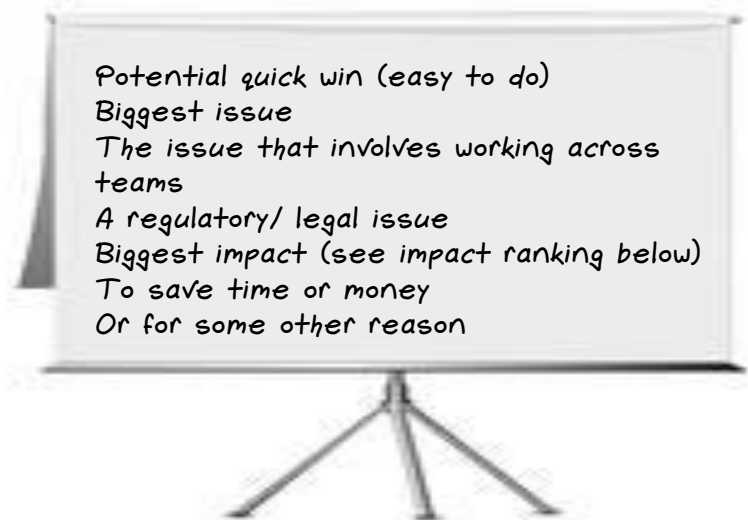
| Question | Your answer |
|--|-------------|
| Who is going to lead on this work? | |
| How are we going to involve: Front line workers Service users Managers Senior managers The board? | |
| When will we start the work? Are there any other changes in the organisation that we need to be aware of? | |
| What resources will we need? | |
| What possible actions have we identified through this guide? | |
| What are our initial priorities? | |
| When will we review our actions? | |

Tools for action planning

Criteria for prioritising actions

Here are some ways in which you can prioritise:

Ask yourself or a group what's of greatest importance.



Impact ranking

Map actions using this grid:

| | High impact | Medium impact | Low impact |
|-------------------|-------------|---------------|------------|
| Easy to do | | | |
| Fairly easy to do | | | |
| Hard to do | | | |

You might want to decide to do all or most of the easy to do, high impact and none of the hard to do, low impact and some of the actions in between.

Put your money where your mouth is

Where money is tight, create false bank notes and write how much it is worth, for example £1,000, £500 etc. Ask participants how they might spend a given sum of money by dividing money between different areas of improvement or actions.

Steps

| Action | Why | Where | Who's involved | How | When |
|--------|-----|-------|----------------|-----|------|
| | | | | | |

Timelines

A line is drawn across a piece of paper (straight or wiggly). People then think of all the things that need to be done, and when, and these are plotted along the line. This is a visual way of taking minutes or other written record.

Section four: Other relevant resources

[Inspiring Impact's Code of Good Impact Practice and related resources here](#)

<http://inspiringimpact.org/resources/are-you-leading-for-impact/>

[Measuring up tool](#)

<http://inspiringimpact.org/measuringup>

[Evaluation Support Scotland resources](#)

<http://www.evaluationsupportscotland.org.uk/resources/>

[Why bother involving people in evaluation? – Beyond feedback](#)

<http://www.evaluationsupportscotland.org.uk/resources/297/>

Inspiring Impact Case Studies:

[Children 1st](#)

<http://www.evaluationsupportscotland.org.uk/resources/353/>

[Macrobert Art Centre](#)

<http://www.evaluationsupportscotland.org.uk/resources/352/>

[The Robertson Trust](#)

<http://www.evaluationsupportscotland.org.uk/resources/351/>

[A good practice case study report](#)

<http://www.evaluationsupportscotland.org.uk/resources/240/>

[Circle](#)

<http://evaluationsupportscotland.org.uk/resources/408/>

ESS Case Study:

[Victim Support Scotland - Consultation and involvement: Using staff experience to inform evaluation systems](#)

<http://www.evaluationsupportscotland.org.uk/resources/405/>

Let's make it stick

Embedding evaluation and impact practice in summary:

Leadership (and power dynamics, give ownership)

Engagement at all levels; people with different personalities and needs, relationships

Time and patience

Skills and capacity building (training)

Motivation

Acknowledgement and acceptance of needing a change

Knowledge and learning focus

Enthusiasm and effort

Investment and resources

Test tools and processes and make them work for the organisation

Supporters and champions

Thoughtful and reflective practice, flexible and proportional to the organisation

Integration

Celebration

Kindness – remember that you do what you can. It's not about being perfect, it's about learning from mistakes and making long-lasting improvements.

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.

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Inspiring Impact is a UK-wide collaborative programme, working with the charity sector to help organisations know what to measure and how to measure.

Evaluation Support Scotland leads the programme in Scotland and over the last few years we have focused on working with organisations to embed evaluation or impact practice, and to share their learning about doing so.

<http://inspiringimpact.org/>

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