

# Embedding evaluation across teams: Why it matters

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## About the Help through Crisis programme

Help through Crisis is a £33 million National Lottery funded programme set up by the Big Lottery Fund, the largest funder of community activity in the UK. It supports 69 partnerships across England which help people who are experiencing or at risk of hardship crisis to overcome the difficulties they are facing to plan for their futures. The partnerships receiving National Lottery funding through the Help through Crisis programme bring together small voluntary groups and established charities to work together locally. Working together, they offer people advice, advocacy and support which matches their personal circumstances. The aim is to look at the issues people face, and the underlying causes, from their basic needs, to their physical and mental health, to skills and employment. People are supported to draw on their personal experiences to build on their skills and strengths so they are ready to seize the opportunities and challenges ahead.

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# The importance of embedding evaluation

While it is important for staff at all levels of a project to understand the benefits of evaluation, it is particularly useful to have **buy-in among the staff and volunteers who are directly involved in delivering the service**. These individuals working at the delivery level will likely need to be involved in the evaluation process, whether it is through co-ordinating client engagement processes or collecting impact measurement data (e.g. via client questionnaires). This is particularly critical for Help through Crisis projects where beneficiary voice is central to service delivery and the staff and volunteers who work directly with beneficiaries are a key link in this process.

**Evaluation should be considered an integral part of project delivery**, not a 'nice to have'. If possible, an evaluation should be planned and appropriately budgeted for in advance of a project to ensure that staff have the time and resources to take part in evaluation activities. This also makes it more likely that they view activities as a key component of the project.

This note sets out **why embedding evaluation matters**. It is accompanied by five case studies of Help through Crisis projects describing how they have collaborated with their teams around feedback and evaluation activities and made positive changes as a result.

We'd love to hear from you if you have any ideas for this paper or other resources you'd like to see. You can get in touch at: [HelpThroughCrisis@ipsos.com](mailto:HelpThroughCrisis@ipsos.com)

*Help through Crisis support team*



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## Case study: Salford Citizens Advice

Salford Citizen's Advice uses an online system to automatically collect case records and selected information about clients. This system records both predicted and actual outcomes, and acts as an *"immediate evaluation"* method to help the organisation keep track of progress. To use this system effectively, case workers create a record and fill this information in for each client they see.

To enhance their evaluation, Salford Citizens Advice aspire to have three members of their advice team capturing feedback by following up with clients at least once a month. The advice workers give advice all day, every day, but have recognised the importance of receiving feedback as well. As they are busy, the manager of the project has acknowledged that a balance needs to be struck between advice services and data collection:

*"They're absolutely committed to the approach, but it's about balancing the need to give the clients fantastic interventions that help them. And it's about how much time you invest in that and how much time you have left to do the evaluating of what you've done."*

Salford Citizens Advice has appointed a staff member as the lead for service user engagement, and some of their time has been freed up to focus on increasing engagement. They have started meeting with clients and holding informal focus groups to gather feedback.



If you can show people the benefit to evaluation, if you show them that a client said that about the work that you did. Then on basic human level, there are not many people who are not going to buy into that. As long as you can show people the fruits of the evaluation, there's not a lot not to like, and they'll want to engage and try to get more of that.

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## Case study: Ashford Place

Ashford Place's evaluation is conducted by a researcher who is onsite every week conducting interviews with clients and peers. Feedback is also collected via feedback forms at the end of each peer training session. Easy and regular access to the evaluator has helped them develop a strong relationship. This means they can collaborate more easily and effectively gather feedback on a regular basis. The project also has meetings every four weeks where the team and the evaluator talk about the project and provide updates. This collaborative approach was built into the project from the beginning.

Peers with lived experience have been trained by the evaluator to undertake interviews with service users, and many are now staff members or volunteers helping the project. Taking a peer based approach has been successful at encouraging beneficiaries to participate in feedback interviews achieving a high response rate. At the same time, this has provided an opportunity for peers to learn new skills.

As a result of the feedback, Ashford Place adapted their peer training course to enable flexible learning. The feedback suggested that a weekly time commitment was too demanding. So now there are several options for getting involved through group sessions once a month, 1:1 training, and shadowing.



*"[We work with] people with literacy at very different levels, and abilities. So, to have a bit of flexibility in there is important. Being flexible to take on suggestions and changes. And to accept that what you originally were doing could be tweaked to be better".*

# The case for evaluation

Evaluation activities allow projects to both [prove](#) the value of the support they provide and to [improve](#) their ultimate impact. This should be emphasised when communicating the importance of evaluation to project staff and volunteers.

## Prove

Evaluation is not just about fulfilling funding requirements but also about enabling your organisation to prove the value of the project to a variety of key stakeholders. This can help to ensure the sustainability of your work into the future. In addition to current and potential funders, other key audiences for your evaluation may include:

- Potential partners and collaborators
- Current and future clients or beneficiaries
- Project supporters (e.g. people in the local community who are interested in or affected by the issues your project aims to address)

The [messages and tactics for influencing toolkit](#) explores how you can use evidence from an evaluation to tell your story in more detail.

## Improve

Evaluation allows you to make better decisions about where to allocate resources by helping you understand how and why your project activities create change. This allows you to direct resources to where your project has the most impact.

Developing a theory of change can help you identify and understand the impact of your project. The [evaluation toolkit](#) explores why a theory of change matters and how you can start to develop one. The [theory of change breakout session](#) from the National Event also provides tips for developing and using a theory of change.

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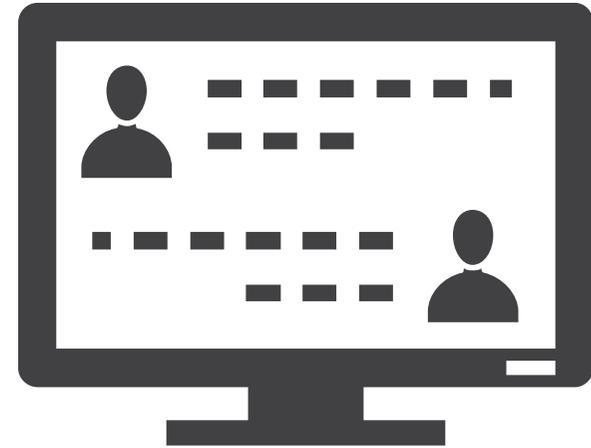
## Case study: MindOut

MindOut runs an online chat service to help LGBTQ people who are in crisis or at risk of a crisis. The chat had been running outside of regular working hours as these are the times when people are likely to feel more vulnerable.

However, by monitoring the number of calls they were receiving, MindOut found that people were calling during normal working hours without anyone to speak to. In response, MindOut expanded the chat service to a regular weekday morning. This means people who do not want to leave contact details when they can't get through, know when they can call back during working hours. This has already helped a number of people in crisis.

Other feedback suggested they should reach sub-groups of the LGBTQ community, such as BAME or Trans LGBTQ people. As such, they have started running themed online chat sessions. In these sessions clients are able to speak directly with someone who has lived experience similar to their own.

Although MindOut regularly tweaks the service in response to feedback, they recognised the sensitivities around gathering feedback from clients who may feel overwhelmed by the number of questions. This led MindOut to redesign their feedback forms with a group of beneficiaries to make them easier to use.



I think you've got to convince staff of the importance of evaluation and show that you do something with it. Likewise you've got to convince your beneficiaries of the importance of it as well. Demonstrating impact is what helps us keep going, it's really important for the sustainability of services and if you want to see them continue for other people, then tell us about it... because without that it's very difficult for us to justify what we do.

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# Why involve project staff and clients in evaluation?

People are more likely to appreciate and want to engage in evaluation when they are part of the process and understand *why* data is being collected and *how* this information is used.

- Involving staff in evaluation planning, data gathering, reviewing and reflecting on the findings can create a strong sense of pride and appreciation in their work. When people help to measure or evaluate something they have been involved in, they can see the scale of change for themselves and take part in celebrating it.
- Involving beneficiaries in evaluation can improve staff understanding of their needs as well as beneficiaries' views on how best to address them. Good evaluation can create a forum in which beneficiaries are able to voice their needs and concerns and project staff are able to be responsive to these needs.

## Case study: Nottingham Women's Centre

The project managers at Nottingham Women's Centre feel they would not be *"getting a rounded view"* without staff involvement in gathering feedback. The project managers try to get everyone involved in evaluation, even if only in a small way. They have frequent meetings where staff from different areas share what they are doing. This keeps everyone in the loop and encourages staff to gather feedback.

Staff and volunteers proactively share feedback with each other, a process which is becoming more natural as the project continues. They collect feedback in informal ways, such as comments made to the reception team, as well as through more structured feedback forms.

The project managers have found that where staff are involved from the outset and know what is happening throughout the organisation, they are more likely to buy into the evaluation *"especially if you can make it fit in with what they're doing."*



Make [giving feedback] really fluid, so that it is literally just a conversation that you're having with somebody, and capture what they say.



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## Case study: Direct Help & Advice

Direct Help & Advice hold celebration days which act as their main source of feedback. The organisation aims to help those in crisis where language is a barrier and because of this, the buddies who work with the organisation are key to gathering feedback. The buddies are assigned to each client based on language needs and work 1:1 with clients to signpost to local services, provide translation support and help complete forms.

During the celebration days, clients and their families, buddies, and the Direct Help & Advice team chat about the process they have all been a part of. Six key questions are asked during these informal sessions. These focus on:

- How a client is feeling compared to before the support was provided
- What can be improved about the service
- Whether clients can foresee needing help in the future.

The buddies are key to the evaluation and happy to participate in gathering the feedback. They have found that using simple questions in an informal setting makes the feedback process work well. At the events, the buddies also comment on the process and make suggestions for improvements.

Direct Help & Advice found that formalised evaluation tools did not fit with their organisation. Instead, they have been on a development journey resulting in the informal celebration days as a way of gathering feedback. The project co-ordinator emphasised that partnerships shouldn't be frightened of changing evaluation methods when they are not working.



*I like to think that nothing that we do is imposed on them [the buddies]. It's more of a collaborative process.*

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