

# Paul Hamlyn Foundation

## Explore and Test Evaluation Support Scheme Brochure



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## Introduction

Please find information on the evaluation consultants / organisations available to you as part of the Explore and Test Evaluation Support Scheme below. For information on what you need to do to access the scheme, please refer to the [Explore and Test Evaluation Support Scheme Procedure Guidance](#).

## Consultant Summary Profiles

### **Sophie Ahmad**

I have 15 years of experience supporting infrastructure bodies, foundations, large national charities and small voluntary and community organisations to assess their impact and improve what they do. I have experience in a range of sectors, but am particularly interested in supporting initiatives that promote the inclusion of marginalised groups. Now working as an independent consultant, I was previously Head of Research at OPM, where I led the research team and OPM's work in the VCS. I have prior experience conducting evaluations for PHF and provided advice to three grantees in the development phase of this new evaluation support offer.

### **Susanne Burns**

I have carried out extensive evaluation work across the art forms on longitudinal as well as short projects. I work with clients to develop frameworks that are fit for purpose, feasible, pragmatic and deliverable within the budget and capacity of the organisation as well as relevant to planned project objectives and outcomes. I approach evaluation as formative learning and work in partnership to ensure that it is embedded in project planning and processes. I encourage clients to consider the potential impact of what they are doing on the wider sector as well as themselves and how this may be shared and disseminated.

### **Pat Cochrane**

As CEO of a not for profit company for nearly 20 years I have first-hand experience of the importance of evaluating practice both to inform an organisation's own work and to influence others including policy makers and funders. While at CapeUK I designed and led many programmes with partners from schools and the arts and cultural sector in which we collaborated to understand the impact of and grow evidence for creative learning programmes. I also commissioned evaluations from National Foundation for Educational Research and research teams from universities including Cambridge, Exeter, Leeds, Manchester Metropolitan and the Open University on a range of learning programmes. Over the past two years I have worked as a freelance consultant with a number of not for profit agencies including IVE and the Royal Shakespeare Company (RSC), Ministry of Stories and First Story to evaluate their practice with children and young people.

### **Shelley Dorrans**

I am an evaluation specialist, with 15 years experience of working with not-for-profit organisations to help them demonstrate their impact and improve outcomes for the people and communities they serve. My work is wide-ranging and includes:

- designing evaluation objectives, frameworks and tools
- 'light touch' advice and support for organisations which are self-evaluating
- evaluation training
- economic evaluation
- independent evaluation.

I work with local and national charities, government departments, public sector commissioners and providers, and independent grant-making foundations. I'm a freelance evaluation and research consultant. My previous roles include: Head of Evaluation at the Office for Public Management and Evaluation Consultant at Blake Stevenson Ltd.

### **Evaluation Support Scotland (ESS)**

Evaluation Support Scotland (ESS) works with the third sector and funders in Scotland so that they can measure and report on their impact and use learning to improve practice and inform policy. Our evaluation support includes workshops and events, 1-1 tailored support and phone or email enquiries. We have a comprehensive [website](#) of resources.

Organisations tell us that we improve their skills, confidence and systems to measure and report on the difference they make. Specifically 1-1 tailored support helps them to:

- Put in place appropriate evaluation methods
- Improve planning and become more joined up internally
- Write outcome-focused reports (and get positive feedback from funders)
- Use evaluation to improve their service, influence others or make successful funding applications.

### **Gerri Moriarty**

I've worked as an evaluator for twenty years. I'm particularly interested in qualitative evaluation methods and in supporting self-evaluation practice, although I can also advise on commissioning external evaluators and on gathering and analysing quantitative information. I've worked with both large and small organisations, helping them to design and implement evaluation frameworks that are realistic and achievable and that support future planning –always remembering that there are many other demands on staff and participant time. As a trainer, I can offer organisations enjoyable workshops in approaches to evaluation, if staff and participants would welcome inspiration and collaborative planning time!

*Unavailable after March 2020*

**Renaishi**

Renaishi is an award winning social enterprise dedicated to supporting people and places to thrive. Our team has 17 years of experience specialising in mixed method evaluations and research for charities, social enterprises and the public sector. We have particular strengths in evaluation design and strategy, and working on issues that are complex and emergent. We always look to work with an organisation from their starting point on evaluation and measurement. In recent years we have done a lot of work on services for young people, employment, arts and culture and organisations experiencing rapid change.

**Donald Ritchie**

I'm an independent organisational development consultant with 27 years experience across the voluntary sector. I take a collaborative approach, and I aim to develop understanding and ownership of the outcomes of my support.

Areas where I could be of most help to Explore and Test grantees include:

- Focusing and refining the desired outcomes of their projects and/or the core evaluation questions that could be of most value
- Setting those outcomes in the context of their longer-term direction and impact
- Developing simple and user-friendly evaluation plans
- Creating briefs for more in-depth support
- Supporting people in making their own evaluations.

**Roz Stewart-Hall**

Since 2000 I have developed creative, inclusive evaluation processes and nurtured a wide range of organisations' potential to evaluate their work. I have supported people to plan and evaluate programmes across disciplines, practices and art forms, including music, visual arts, socially engaged practice, theatre, outdoor arts and circus. I have also worked in non-arts contexts and have supported a wide range of voluntary and third sector organisations to develop evaluation processes and frameworks, as well as theories of change and organisational strategic development.

**York Consulting**

York Consulting is a leading social and economic consultancy based in Leeds. We provide a client friendly service and will work with you to provide an evaluation that meets your needs. We have a wealth of experience providing social and economic research for voluntary and community organisations working to develop the skills, talents and wellbeing of children, young people and adults. We specialise in designing research that blends qualitative and quantitative methods and draws on the participant's experience throughout the design and delivery of programmes.

**Hannah Wilmot**

I am an evaluation specialist with 25 years experience of working with not for profit organisations to help them understand the difference their work is making and improve what they do. I have worked with large national institutions and small community-based organisations; on short-term projects and longitudinal studies. I work with clients and project partners to develop frameworks that are purposeful, realistic and achievable within project budgets and organisational capacity. I am a facilitator and listener; I find structures and tools that enable all those participating in a project to reflect on the experience and their own learning.

## Consultant Contact Details

Evaluation Consultant	Email	Fund			Pages
		Arts Access and Participation Fund	Arts-based Learning Fund	Shared Ground Fund	
Sophie Ahmad	<a href="mailto:sophieahmad@hotmail.com">sophieahmad@hotmail.com</a>	✓	✓	✓	8
Susanne Burns <a href="http://www.susanneburns.co.uk">www.susanneburns.co.uk</a>	<a href="mailto:susanneburns57@gmail.com">susanneburns57@gmail.com</a>	✓	✓	X	12
Pat Cochrane	<a href="mailto:p.e.cochrane@gmail.com">p.e.cochrane@gmail.com</a>	✓	✓	✓	15
Shelley Dorrans	<a href="mailto:shelleydorrans@gmail.com">shelleydorrans@gmail.com</a>	✓	✓	✓	19
Evaluation Support Scotland <a href="http://www.evaluationsupportscotland.org.uk">www.evaluationsupportscotland.org.uk</a>	<a href="mailto:steven@evaluationsupportscotland.org.uk">steven@evaluationsupportscotland.org.uk</a> OR <a href="mailto:info@evaluationsupportscotland.org.uk">info@evaluationsupportscotland.org.uk</a>	✓	✓	✓	22
Gerri Moriarty <a href="http://www.gerrimoriarty.com">www.gerrimoriarty.com</a>	<a href="mailto:gerri.moriarty1@virginmedia.com">gerri.moriarty1@virginmedia.com</a>	✓	X	✓	26
Renaisi <a href="http://www.renaisi.com">www.renaisi.com</a>	<a href="mailto:j.hitchin@renaisi.com">j.hitchin@renaisi.com</a>	✓	✓	✓	29
Donald Ritchie <a href="http://www.donaldritchieconsulting.co.uk">www.donaldritchieconsulting.co.uk</a>	<a href="mailto:donald.ritchie.consulting@gmail.com">donald.ritchie.consulting@gmail.com</a>	✓	✓	✓	33
Roz Stewart-Hall	<a href="mailto:drrozhall@gmail.com">drrozhall@gmail.com</a>	✓	✓	X	36
York Consulting <a href="http://www.yorkconsulting.co.uk">www.yorkconsulting.co.uk</a>	<a href="mailto:philip.wilson@yorkconsulting.co.uk">philip.wilson@yorkconsulting.co.uk</a>	✓	✓	✓	42
Hannah Wilmot	<a href="mailto:Hannahwilmot@talktalk.net">Hannahwilmot@talktalk.net</a>	✓	✓	X	46

## Detailed consultant Profiles

### Sophie Ahmad

sophieahmad@hotmail.com

<p><b>1. Summary of previous experience of working with not for profit organisations to evaluate their work, including experience of supporting them to develop their evaluation plans.</b></p>	
<p>I have 15 years of experience supporting organisations in the third sector to review their work and assess their impact. I have worked with infrastructure bodies, foundations, large national charities and small, local voluntary and community organisations. I have supported organisations working in a range of fields, including: employment and skills; the arts; children, young people and families; health; migration and integration; substance misuse; and homelessness and destitution. My work has included carrying out whole organisational reviews as well as process and impact evaluations of particular policies, programmes and projects. I have worked directly for third sector clients and also for government and charitable funders. I have quality-assured evaluation studies conducted by other researchers, as well as designing and directing my own work. I have also helped numerous organisations to carry out self-evaluations. I am committed to working in partnership with my clients and to helping them use evaluation processes and findings to promote learning and change. My career in research and evaluation began at the specialist third sector consultancy Compass Partnership. More recently, I was Head of Research at the Office for Public Management, where I led the research team and the organisation's work in the third sector. I now work as an independent research and evaluation consultant. I have an MSc in Research Methods from the London School of Economics and am a qualified executive coach.</p>	
<p><b>2. Types of support that can be provided</b></p>	
- Supporting the development of evaluation plans and frameworks	Yes
- Supporting the development of a 'theory of change' or similar	Yes
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc	Yes
- Supporting the development of plans to improve the use of evaluation information	Yes
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes
<p><b>3. Examples of previous experience and success in delivering these types of support:</b></p>	
<p><i>Evaluation plans and frameworks:</i> I have worked with a wide range of independent researchers, research agencies and academic departments and have a good understanding of different evaluation frameworks and approaches. I have used this experience to help numerous organisations to develop, review and improve their evaluation plans and practice. For example, I recently helped a charitable foundation to</p>	



reflect on their approach to commissioning and learning from evaluations and providing evaluation support to their grantees.

I have developed assessment frameworks and strategies to review several national voluntary sector infrastructure bodies. I have also provided advice on evaluation approaches to small voluntary and community groups on a probono basis.

*Theory of change:* I first worked with theory of change approaches 15 years ago, carrying out policy evaluations for central government. Since then I have helped many organisations to explore the impact they want to achieve and clarify their assumptions about how change will flow from their planned actions. I have experience running workshops with staff and stakeholders to explore these issues. For example, with a colleague I recently helped a leading homelessness charity to develop a theory of change for a project piloting a new approach to supporting homeless people.

*Expertise of non-specialists:* Much of my evaluation work involves advising and supporting non-specialists. I am committed to working in partnership with my clients and sharing expertise wherever possible. For example, I supported staff in a community health trust to conduct research with their local gypsy and traveller community, and staff at an employment charity to collect data as part of a project on inter-generational worklessness.

*Use of evaluation information:* I am committed to helping my clients use evaluation processes and findings to reflect on their work and improve what they do. For example, on the back of an evaluation study I recently conducted with a colleague, I ran a series of workshops for staff at a leading health charity to help them identify how to improve the support they provide to healthcare professionals involved in local improvement networks. I am currently supporting a local authority to develop a framework for synthesising and communicating data and research evidence to support their new five-year plan.

*Commissioning evaluators:* In the development phase of this new evaluation support offer I helped two PHF grantees to commission an external evaluator. This involved helping the organisations to clarify programme and evaluation aims, writing tender documents, providing advice on research organisations to approach, reviewing research proposals and providing feedback. I am currently supporting another peer-led organisation to develop an action-learning project and commission a learning partner.

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	Yes
Arts-based Learning	Yes

**5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.**

*Arts access and participation:* I recently carried out an end of programme review of Our Museum – a PHF Special Initiative designed to support museums and galleries to undergo a change process to embed good participatory practice.

The work involved an exploration of the drivers for and challenges involved in promoting access, deepening participation and challenging established power dynamics in small local museums and galleries as well as large national institutions.

It explored how funders could help promote change through a model that combines funding with other types of support. I have supported two other arts organisations funded by PHF to clarify their evaluation plans and commission an external evaluator: one that offers whole-school music interventions (see above), and another that supports artists with learning disabilities to develop their practice. In addition, I have carried out extensive research in other fields to help third and public sector organisations to explore how services can be made more accessible to people from different communities and with a range of 'protected characteristics', including people from different ethnic backgrounds, of different faiths, with different sexual orientations and disabilities.

*Shared Ground (migration and integration):* I am currently leading the evaluation of the Supported Options Initiative, on behalf of Paul Hamlyn Foundation and Unbound Philanthropy. The initiative aims to improve opportunities for children and young people without settled status in the UK, and involves a coalition of organisations (law centres, youth and children's charities and migrant rights organisations) working together to develop new solutions. The work has involved exploring how developments in the law, policy, economy and public attitudes have shaped the pressures on organisations active in this space. I have recently provided up front support to a PHF grantee to help them develop their evaluation plans for a new migration project. This has involved helping them to clarify their aims and support model and identify appropriate ways of capturing different types of impact. I have recently evaluated an integration programme for new migrants, involving a blend of therapeutic support, ESOL and citizenship classes designed to help new migrants to thrive in UK society. In addition, I have helped numerous organisations to develop equality and diversity strategies and carry out equality impact assessments.

*Arts based learning:* As highlighted above, I have provided up front evaluation support to an organisation in receipt of a PHF grant to expand a schools-based music programme designed to improve educational outcomes, attendance and community participation in school life. The support included helping the organisation to clarify programme and evaluation aims, writing a tender document, providing advice on research organisations to approach, reviewing research proposals and providing feedback. In addition, I have supported the evaluation of a yoga-based intervention in schools for children with special needs, and have conducted several pieces of research into the changing role of teachers and the teaching profession.

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

I have experience carrying out a wide range of different types of evaluation. My work usually involves the development of a Theory of Change or Logic Model setting out how a programme or project is intended to work, and a range of qualitative and quantitative strategies for researching impact and understanding change processes. I am particularly skilled at using qualitative research to explore expectations and experiences of programmes, projects and services, including research with 'vulnerable' or 'marginalised' groups. I have led projects involving assessments of the economic value of interventions. I am familiar with a range of approaches and tools used in evaluation in different sectors.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

I carry out a wide range of other types of research designed to explore issues in the community, identify gaps in the provision of services and determine how successful services might be designed and delivered. I have particular interests in qualitative research, research with 'marginalised' groups, and research into organisational life and professional roles. In addition to my research and evaluation practice, I work as an organisational development consultant, helping clients to develop new strategies and services, strengthen governance arrangements and forge new partnerships. I am an experienced facilitator and an accredited executive coach. I had a previous career commissioning and publishing books in social science, and I continue to support some individual clients and organisations to produce and edit research reports and other publications.

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

I am based in central London, but would be willing to travel across the UK if required.

<b>1. Summary of previous experience of working with not for profit organisations to evaluate their work, including experience of supporting them to develop their evaluation plans.</b>	
<p>I have worked extensively in evaluation for over 14 years and have led programmes of work and projects that have been longitudinal as well as short one off projects. I approach evaluation as learning and work in partnership with my clients to ensure that it is embedded in the project planning and processes. I have worked across artforms and sectors.</p> <p>A framework should be fit for purpose so it must be bespoke – there is no one size fits all – it must be relevant to the planned project objectives and aspired for outcomes ensuring that it helps the organisation to understand what is working, what isn't and why. It must also be feasible, pragmatic and deliverable within the budget and capacity of the organisation.</p> <p>I believe that evaluation is fundamentally formative and should inform projects as they progress towards the change that they are trying to effect. Thus, a first step in designing any evaluation must be to determine the change the client is seeking to make through the project or programme. The development of an evaluation framework should support the project planning process and thus enable it to be built into the DNA of the project. I believe in sharing learning accrued through evaluation and seek wherever possible to encourage clients to consider in the project planning stages the potential impact of what they are doing on the wider sector and how this may be shared and disseminated.</p>	
<b>2. Types of support that can be provided:</b>	
- Supporting the development of evaluation plans and frameworks	Yes
- Supporting the development of a 'theory of change' or similar	Yes
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc	Yes
- Supporting the development of plans to improve the use of evaluation information	Yes
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes
<b>3. Examples of previous experience and success in delivering these types of support:</b>	
<ul style="list-style-type: none"> <li>I have led the evaluation of In Harmony Liverpool since 2009 working closely with the project team to design and embed evaluation and learning processes into their management and reflection on the programme. I have produced a series of major reports and led on the development of an overarching research framework for the project that involves other researchers and academics:</li> </ul>	

- I have worked with companies and organisations to develop evaluation plans both in support of funding applications as well as within long term contracts. For example, I supported Upswing Circus with their Strategic Touring application to ACE and am now working with them on the project. I am currently working with Stratford Circus to develop plans for an early years project
- I evaluated Fevered Sleep's Future Play project and continue to work with the company as a Research Consultant supporting a four year programme of organisational change and development including the evaluation of all projects taking place over the period. We plan a major publication sharing the learning in 2020
- I have developed complex and multi faceted change/ logic models and am currently developing an overarching evaluation framework to support this for the Leeds Dance Partnership which will encompass a three year programme of work delivered by different partners
- I have provided training and support in data gathering and build capacity within the organisations with whom I have worked to embed evaluation within their organisations
- I have developed plans for dissemination and use of evaluation data to ensure learning is shared with the sector. I have written academic papers and presented at conferences to share learning and have written for Arts Professional, created blogs and publications that share evidence in digestible and accessible formats. My work with [Fevered Sleep on Future Play](#) led to a section of the resulting toolkit being developed that dealt with evaluation
- I have also created briefs for evaluation and have been involved in the selection of evaluators on a number of occasions but most recently in my work as Project Director for ArtWorks for the Paul Hamlyn Foundation. It is crucial that the brief explains clearly what is needed and this will inform the choice of the evaluator and the management of the process.

I believe my success in delivering support for projects is evidenced in the long term relationships I have formed with clients – notably, Fevered Sleep and the Liverpool Philharmonic who have recently engaged me to evaluate their Musician in Residence programme as well as In Harmony Liverpool. It has also led to work with other clients such as Clod Ensemble where I led the evaluation of a Strategic Touring project.

**4. PHF Funds that can be supported:**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	No
Arts-based Learning	Yes

**5. Previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas selected.**

**Arts Access and Participation:**

I have extensive experience of working in the areas of arts access and participation and led the PHF funded special initiative, ArtWorks: Developing Practice in Participatory Settings. As an evaluator, I have knowledge and skills in key areas of data gathering that in themselves are participatory including focus groups, interviews and believe in engaging people in evaluation as opportunities for reflection and learning. Recent examples include:

- Clod Ensemble – The Red Chair
- Upswing Circus – Bedtime Stories
- Fevered Sleep – Future Play and current work on 4 year programme of activity supported by the PHF and Wellcome Trust

*Arts based learning:* As a trained teacher, I have a lifelong commitment to education and arts based learning. My work on In Harmony Liverpool has enabled me to develop my skills and expertise in working with children and teaching staff and I have involved children as young as 2 years in the evaluation process.

**6. Overview of the evaluation methods and approaches including details of specialisms.**

I have extensive experience of both qualitative and quantitative methods of data gathering and am able to adapt approaches to the specific needs of clients. I can design surveys and questionnaires and have skills in analysing data and subsequently presenting this in digestible formats. I am a skilled facilitator and lead focus groups and round table discussions in creative ways that generate learning and qualitative data. I am a skilled interviewer and have developed my skills in working with young people in interviews and groups. I have measured impact in key areas such as health and wellbeing, social impact and return on investment and have managed complex multi tiered partnership evaluation projects that require multiple perspectives and lenses to be applied.

**7. Other experience or skills that may be relevant.**

As a trained coach and action learning facilitator, I believe that the skills I can bring to projects are enabling and support capacity building for those organisations with whom I work.

I have led many organisational change projects including business modelling and the development of partnerships and consortia (For example, Liverpool Arts and Regeneration Consortium, Dance Training and Accreditation Project and the Leeds Dance Partnership.)

I am an experienced and skilled trainer and facilitator and have provided training for both HE providers and those in the not for profit sector (For example, Royal Conservatoire of Scotland, Engage Cymru, Create, People Dancing, Tate Liverpool.)

I am also a researcher and have carried out many research projects that are not specifically about evaluation. (For example, a recent study of perceptions for the Wellcome Trust, a review of dance provision for the University of Sunderland, a review of participatory programmes for Belfast Exposed and the Arts Council England Dance Mapping research.)

I am currently working with Mersey Care Mental Health Trust developing guidance for musicians on the ethics of gathering evidence from Service Users to support the evaluation of their creative programmes and have experience of ethics as a direct result of my work on my PhD at Middlesex University.

My PhD was concerned with systemic change in the cultural sector and I have direct knowledge of systems, field and network analysis – skills which I now use to support change related evaluation programmes.

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

I am happy to travel across the UK including Northern Ireland.

Pat Cochrane

[p.e.cochrane@gmail.com](mailto:p.e.cochrane@gmail.com)

<b>1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including where relevant your experience of supporting them to develop their evaluation plans.</b>	
<p>As CEO of a not for profit company for nearly 20 years I have first-hand experience of the importance of evaluating practice both to inform an organisation's own work and to influence others including policy makers and funders. While at CapeUK I designed and led many programmes with partners from schools and the arts and cultural sector in which we collaborated to understand the impact of and grow evidence for creative learning programmes. I also commissioned evaluations from National Foundation for Educational Research and research teams from universities including Cambridge, Exeter, Leeds, Manchester Metropolitan and the Open University on a range of learning programmes.</p> <p>Over the past two years I have worked as a freelance consultant with a number of not for profit agencies including IVE and the Royal Shakespeare Company (RSC), Ministry of Stories and First Story to evaluate their practice with children and young people.</p>	
<b>2. Please indicate which of the following types of support you would be able to offer to grantees:</b>	
- Supporting the development of evaluation plans and frameworks	Yes
- Supporting the development of a 'theory of change' or similar.	Yes
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	Yes
- Supporting the development of plans to improve the use of evaluation information.	Yes
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes
<b>3. Please provide examples of your previous experience and success in delivering these types of support:</b>	
<p>I designed and led the national Creativity Action Research Awards (CARA) programme in 2004 on behalf of Creative Partnerships. This was a two-year programme enabling nearly 300 partnerships between schools and creative and cultural sector organisations to explore and investigate the impact of their collaboration on a chosen aspect of children's learning. Each scheme worked with a mentor, producing a report and we then produced an overall report on the findings of the 120 projects in the second year of the scheme. As well as designing the overall programme, leading professional development for the participants and designing the overall approach to evaluation, I mentored a number of the partnerships between schools and arts organisations. Many organisations cited CARA as influencing their subsequent practice.</p> <p>Strong Voices (2015) was a Department for Education funded collaboration between five Arts Council England Bridge organisations to explore the impact that a range of arts</p>	

interventions would have on the lives of vulnerable young people. Each of the five organisations worked in different ways but all were based on complex partnerships between statutory agencies and the arts and cultural sector. I designed a reflective process to enable each of the teams to share learnings from the different projects so that they could shape and plan their practice accordingly. A number of participants described the reflection processes as one of the most powerful they had experienced.

Over the past two years, I have been working within the IVE /Royal Shakespeare Company project, one of the pilot projects in the PHF Teacher Development Fund (TDF), which was seeking to investigate how a combination of the rehearsal room practices and a 2 year action research process would enable teachers to embed arts-based approaches into their practice and what the impact of this approach would be on disadvantaged young people. I designed and led the evaluation process within this project. The programme was highly regarded and informed design of the roll out of the TDF.

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	Yes
Arts-based Learning	Yes

**5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.**

I have experience in all three fund areas, particularly in relation to children, families and young people.

**Art access and participation** As the CEO of CapeUK, which became the Arts Council England’s bridge organisation for Yorkshire and the Humber, one of our main concerns was to increase access of all young people to arts and cultural activities. This involved enabling organisations to reflect on and, where appropriate, radically redesign their offer and where they focused their energies.

**Shared ground – migration and integration.** I started my working life teaching at Brixton College working with many young people who had recently arrived from the Caribbean to join their parents who had settled here. I developed education programmes to increase access of young people into further education and contributed to an influential report – a Second Chance. Subsequently working in community education in inner city Leeds I developed many programmes which were tailored to the needs and interests of BAME communities – language learning, rights, health and community activism as well as arts and cultural programmes in dance, photography, and creative writing. At CapeUK we gained European, Home Office and Trust funding to explore the role of the arts in increasing understanding between diverse groups, increase integration and also in tackling racism.

**Arts based learning.** I have worked in this field for the past twenty years, contributing to both policy and practice. Our work informed the 1999 ‘All our Futures’ report, and I



co- wrote the chapter on leadership, initial teacher education and Continuing Professional Development and Learning in the Roberts Report, 'Nurturing creativity and young people'. My work has focused on pedagogy, partnerships and professional development and the leadership which enables this.

I have extensive experience in the evaluation of arts-based learning in both formal and informal/youth settings. For example, I set up and managed the Creativity Action Research Awards (CARA). Out of this grew the Learning to Enquire process – an action research informed reflective process. Each of these partnerships was supported to prepare a report to share their learning. As well as large scale evaluations I have worked with companies to evaluate specific programmes, so for example, I worked with Ministry of Stories to support them to evaluate a creative writing programme in a primary school. Working closely with the project coordinator we developed a process to capture and analyse the impact of the creative writing intervention on both the children as writers and the children's personal skills.

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

I am experienced in a range of different approaches to evaluation and draw on both quantitative and qualitative methodologies.

When approaching an evaluation brief I spend time with the organisation to clarify the brief, purpose of the evaluation, what they are trying to discover and to understand if there are specific monitoring requirements. I then adapt my approach to the organisation's needs.

I try to make sure that the approaches used are appropriate to the scale of the intervention and that the aims of the evaluation are aspirational but also achievable and realistic within the scale and resource of the programme. Many arts-based programmes tend to seek to 'prove' outcomes which are unrealistic within the scope of their work. I would work collaboratively to draw up a simple theory of change. I seek to encourage organisations to adopt evidence-based practice tailoring observational tools and data gathering processes which will enrich the skills and development of the organisation itself as well as enabling it to understand and explain the impact and outcomes of their project or intervention. I draw on a range of accessible tools and resources including the CapeUK Learning to Enquire pack, Teacher Artist Partnership Programme (TAPP) and visible learning processes developed by project Zero at Harvard University. The recently produced RSA handbook of arts education evaluation will also prove a useful resource.

I am experienced in drawing up evaluation briefs and so could support organisations in the process of commissioning an external evaluator.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

As CEO of a successful not for profit organisation for nearly 20 years I am very aware of the challenges organisations face as the social, political and funding context changes. I

would be confident supporting organisations to develop a change strategy. I am used to working within complex accountability frameworks and the challenge of balancing funders needs with the aspirations of a not for profit organisation.

I was Chair of a co-operative Trust based on a network of schools in East Leeds for 6 years. The trust developed community wide initiatives to improve the opportunities and life chances for of children in the former mining communities it served. Until 2018, I was a member of the multi academy trust which evolved from this Trust.

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

I am based in Sheffield and London. I would be happy to travel to most places in the UK with sufficient notice. I have access to good rail links which connect to stations between Sheffield and London, the North East, South West, Edinburgh and Glasgow. I have easy access to Manchester Airport, so have easy access to Northern Ireland.

## Shelley Dorrans

[shelleydorrans@gmail.com](mailto:shelleydorrans@gmail.com)

<b>1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including where relevant your experience of supporting them to develop their evaluation plans.</b>	
<p>I am an evaluation specialist, with 15 years' experience of working with not-for-profit organisations to help them demonstrate their impact and improve outcomes for the people and communities they serve. My work is wide-ranging and includes:</p> <ul style="list-style-type: none"><li>- designing evaluation objectives, frameworks and tools</li><li>- providing 'light touch' advice and support for organisations which are self-evaluating their project/s</li><li>- evaluation training, including the principles and design features of 'good' evaluation</li><li>- economic evaluation</li><li>- designing and delivering independent evaluations.</li></ul> <p>I work with local and national charities, government departments, public sector commissioners and providers, and independent grant-making foundations. This has included Macmillan Cancer Support, the British Heart Foundation, Hearts &amp; Minds Scotland, the Health Foundation, Sandwell Council, Camden Clinical Commissioning Group, the Department of Health and the Paul Hamlyn Foundation.</p> <p>I currently work as a freelance evaluation and research consultant. My previous roles include: Head of Evaluation at the Office for Public Management (in London) and Evaluation Consultant at Blake Stevenson Ltd (in Edinburgh).</p>	
<b>2. Please indicate which of the following types of support you would be able to offer to grantees:</b>	
- Supporting the development of evaluation plans and frameworks	Yes
- Supporting the development of a 'theory of change' or similar	Yes
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc	Yes
- Supporting the development of plans to improve the use of evaluation information	Yes
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes
<b>3. Please provide examples of your previous experience and success in delivering these types of support:</b>	
<p>I have a particular interest and passion for helping organisations to build their own skills to evidence the social and economic impact of their work. Some specific examples of my work include:</p> <ul style="list-style-type: none"><li>- working with Trustees and staff at a Community Association to develop an evaluation framework and methodology to provide evidence of impact to current and potential</li></ul>	

funders. This included training in the principles of good evaluation design; drafting a theory of change, evaluation plan and data collection tools; and providing ongoing light touch advice/support to those responsible for data collection

- evaluation training sessions to 12 organisations linked to a national volunteering charity for 14-25 year olds. Topics included: developing a theory of change, designing an evaluation, choosing a methodology, and if and how to assess value for money
- training and supporting care navigator staff at a local older people's charity to administer validated research questionnaires to residents who receive support, and to input and analyse the data to ensure ongoing service improvement and provide evidence of impact to their local CCG, which funds the service
- developing an Evaluation Framework for a rural County Council's children's services, involving a common approach to costing interventions, and reporting and monetising outcomes
- undertaking formative evaluations of mental health in schools projects for four local authorities, which involved regular collation, analysis and reporting of data to shape the ongoing design and delivery of the projects.

I have responded to many evaluation briefs/tenders over the last 15 plus years. I have a thorough understanding of what makes a 'good' invitation to tender (ITT), and the kinds of information that need to be included in order to attract a range of suitable proposals.

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	Yes
Arts-based Learning	Yes

**5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.**

Much of my work has concerned populations or groups of people who are vulnerable and/or may be disadvantaged in some way including older people, BME communities, children and young people, disabled people, and those on low or no incomes.

I have worked across a wide range of policy areas including education, health, social care, equalities, homelessness and early years. Some examples of my work in relation to arts and migration include:

- supporting a national young people's charity, which uses writing and journalism to give young people a voice, to design a social return on investment study
- evaluating a Scottish charity's two arts-in-health programmes aimed at children in hospital or hospice care, and elderly people with dementia
- supporting a Welsh charity, which tackles deprivation and educational underachievement through musicianship, to commission an independent evaluation of their work (in partnership with my colleague Sophie Ahmad)

- evaluating the Supported Options Initiative (in partnership with my colleague Sophie Ahmad), which involves a coalition of organisations working together to improve opportunities for children and young people without settled status in the UK, for Paul Hamlyn Foundation and Unbound Philanthropy
- developing a series of case studies for what was the Learning and Skills Council, including several which illustrated how education providers were using music and arts to successfully ‘close the gap’ in educational attainment amongst children and young people from disadvantaged backgrounds
- undertaking an independent evaluation of a local yoga-based charity’s work with children in special schools to improve their concentration and behaviour in the classroom.

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

I have many years’ experience of designing and delivering evaluations and can offer expertise in the following approaches and methods:

- evaluation design: including formative and summative studies, quasi-experimental designs, and exploratory research
- qualitative methods: including interviews, focus groups and case studies
- creative approaches to data collection: including video diaries, vox pops, and ‘draw and write’ approaches suited to young children
- quantitative research: including survey design and analysis
- literature/evidence reviews.

Additionally, I have worked with many organisations to determine the most appropriate approach and methods for demonstrating the economic value and impact of their work.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

I am able to provide advice and support in relation to:

- performance management and the development of key performance indicators (KPIs)
- ethics and data protection
- undertaking research with children and young people
- presenting and communicating evidence to wider audiences, such as funders
- using research and evidence to influence strategy.

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

Anywhere that can be reached within 3 hours of London by train, car or plane (childcare issues would limit travel much further than this). I can also work in Northern Ireland.

## Evaluation Support Scotland (ESS)

**Email:** [steven@evaluationsupportscotland.org.uk](mailto:steven@evaluationsupportscotland.org.uk) OR  
[info@evaluationsupportscotland.org.uk](mailto:info@evaluationsupportscotland.org.uk)

<p><b>1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including, where relevant, your experience of supporting them to develop their evaluation plans.</b></p>	
<p>Evaluation Support Scotland (ESS) works with the third sector and funders in Scotland so that they can measure and report on their impact and use learning to improve practice and inform policy.</p> <p>Our evaluation support includes <b>workshops and events</b>, <b>1-1 tailored support</b> and phone or email <b>enquiries</b>. We have a comprehensive <a href="#">website</a> of resources.</p> <p>Organisations tell us that we improve their skills, confidence and systems to measure and report on the difference they make. Specifically 1-1 tailored support helps them to:</p> <ul style="list-style-type: none"> <li>• Put in place appropriate evaluation methods</li> <li>• Improve planning and become more joined up internally</li> <li>• Write outcome-focused reports (and get positive feedback from funders)</li> <li>• Use evaluation to improve their service, influence others or make successful funding applications.</li> </ul> <p>Quote from our 2018/19 Annual report  “...ESS is good a helping people understand expert approaches to evaluation, breaking through the myths and jargon. Good at helping people understand and plan how to do evaluation as part of ongoing work. Supportive and friendly approach. Excellent understanding of the challenges of the sector and therefore our evaluation support needs”</p>	
<p><b>2. Please indicate which of the following types of support you would be able to offer to PHF grantees:</b></p>	
- Supporting the development of evaluation plans and frameworks	<input checked="" type="checkbox"/>
- Supporting the development of a ‘theory of change’ or similar.	<input checked="" type="checkbox"/>
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	<input checked="" type="checkbox"/>
- Supporting the development of plans to improve the use of evaluation information.	<input checked="" type="checkbox"/>
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	<input checked="" type="checkbox"/>
<p><b>3. Please provide examples of your previous experience and success in delivering these types of support:</b></p>	

Our support helps third sector organisations to develop evaluation plans and frameworks that are appropriate for their own organisation.



We help them think through and articulate their 'theory of change'. Essentially we help organisations to articulate the difference they want to make (their **outcomes**) and what they do to make that difference. We might help them do that in a logic model (a diagram of activities and outcomes) or a simpler Weaver's Triangle. See our website for examples of those [tools](#). Then we work with them to develop and use appropriate **methods** to collect evidence about activities and outcomes, and to **analyse** that evidence so they can **report** on whether and how they have made a difference.

The way we do this through the PHF support is by providing **tailored support**. This involves one or more meetings of about 2-3 hours between a member of the ESS team and a person or a few people from your organisation. Support is **tailored to the needs of your organisation** and might include supporting you to (although not all at once!):

- Write outcomes
- Define indicators
- Develop appropriate information collection methods
- Analyse data you have gathered
- Write reports
- Devise an evaluation plan
- Embed evaluation into your organisation
- Think about what you want from an "external evaluation".

So far (Dec 2019) we have supported six Scotland Explore and Test grantholders. Each organisation received different support tailored to their need but has including helping them to:

- Develop some self-evaluation plans and methods
- Create a specification for an external evaluation
- Help involve volunteers and services users in evaluation
- Reflect on the evidence gathered through the project and identify learning points

"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 (an Explore and Test grantholder)

Please see the [case studies section](#) of our website for more examples of how we support different organisations to evaluate.

ESS does not undertake external evaluations. However we have provided support to organisations to commission external. This involved helping them draft the specification, manage the evaluation and to use the findings. We have a [guide](#) on our website to help organisations commission and manage evaluations.

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	<input checked="" type="checkbox"/>
Shared Ground (migration and integration)	<input checked="" type="checkbox"/>

Arts-based Learning	☒
<b>5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.</b>	
<p>We have provided evaluation support to many organisations aiming to widen participation in the arts or to improve arts activities. For example – please click this link to see a case study of our work with Music 4 U which provides performing arts opportunities to participants from varying backgrounds, including those affected by physical and learning disabilities, from areas of social and financial deprivation and who are on the autistic spectrum. <a href="http://www.evaluationsupportscotland.org.uk/resources/493/">http://www.evaluationsupportscotland.org.uk/resources/493/</a></p> <p>“Our team now talks about outcomes and evaluation as part of our everyday delivery. We are all on the same page and working towards the same goal. Honestly, it’s priceless what we learned!” Member of the team quoted in the case study</p> <p>Here is a link to another case study with the Macrobert Art Centre who worked with us to make evaluation a meaningful part of reflective practice and improvement:  <a href="http://www.evaluationsupportscotland.org.uk/media/uploads/resources/ii_case_study_-_macrobert_arts_center.pdf">http://www.evaluationsupportscotland.org.uk/media/uploads/resources/ii_case_study_-_macrobert_arts_center.pdf</a></p>	
<b>6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.</b>	
<p>In order to ensure we at ESS make a difference, we work in the following way:</p> <ol style="list-style-type: none"> <li>1. We are accessible. We use plain English. We are friendly. We work in a way that meets people and organisations’ different needs and abilities.</li> <li>2. We work collaboratively with organisations combining their expertise with ours to generate evaluation approaches they own, develop and run with.</li> <li>3. We use different and creative ways to engage people in evaluation. We promote a wide range of evaluation tools.</li> <li>4. We are a centre of expertise on self-evaluation in the third sector and we share what we know.</li> <li>5. We work in positive partnership with others, sharing our learning and adding value to the expertise of others. We provide effective platforms for evaluation evidence to reach intended (and unintended) audiences.</li> <li>6. We promote a culture of learning within ESS. We seek feedback from everyone we work with so we learn from our successes and weaknesses and get better at what we do.</li> <li>7. ESS is a good place to work. We support and develop our staff and trustees so they can fulfil their roles and feel valued.</li> </ol> <p>We try to avoid jargon to make evaluation accessible so we’re avoiding using technical jargon to answer this question! But we do have robust research and evaluation experience, particularly in relation to appropriate and accessible methods. We have expertise in theory of change/logic models, in user involvement in evaluation and in the theory and practice of using evidence to improve policy and practice.</p>	
<b>7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising</b>	



**on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

Some other things we do at ESS that might be useful to know:

Our “Let’s Evaluate” workshop programme is 3 full day workshops: *Getting Started* (outcomes and indicators), *Make to Measure* (methods and tools) and *Telling My Story* (analysing and reporting). We have advanced workshops on using evidence, logic modelling and using stories as an evaluation method.

Our thematic programmes are about working with subsectors of the third sector to explain, measure and prove their impact. These programmes have helped make the case for the role of the third sector in policy and the resources are freely available. There is a lot more information on our [website](#).

We work with most major funders of the third sector in Scotland. Our ‘*Harmonising Reporting*’ resource is used by funders to make reporting more useful and less burdensome.

We have expertise helping organisations to involve their service users / beneficiaries in evaluation – most recently with a focus on young people.

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

ESS is a charity and our charitable purpose only allow us to work in Scotland. We are happy to, and have experience of travelling to all parts of Scotland and also have lots of experience of providing support by telephone and occasionally, skype. But can provide support the Scotland wing of a UK charity. Our website is freely accessible to any organisation from across the UK are welcome to access any of our resources.

## Gerri Moriarty

[gerri.moriarty1@virginmedia.com](mailto:gerri.moriarty1@virginmedia.com)

<b>1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including where relevant your experience of supporting them to develop their evaluation plans.</b>	
<p>I have been working with not for profit organisations to support them in planning and implementing evaluation of their work for over twenty years; this has ranged from larger organisations such as the Arts Council of Northern Ireland and the Royal Exchange Theatre, Manchester to smaller organisations such as the Ministry of Stories in London and M6 Theatre Company in Rochdale. I am particularly interested in formative evaluation and qualitative methodologies, although able to advise on and analyse quantitative information.</p> <p>Most recently, I have prioritised:</p> <ul style="list-style-type: none"><li>• Helping organisations to strengthen their internal evaluation processes, through developing evaluation plans, reviewing and analysing data and identifying key information for reports with staff</li><li>• Presenting evaluation data visually, working with a film-maker, supplemented by shorter written reports</li><li>• Training for and collaboration with younger practitioners to develop their experience in evaluation</li></ul>	
<b>2. Please indicate which of the following types of support you would be able to offer to grantees:</b>	
- Supporting the development of evaluation plans and frameworks	Yes
- Supporting the development of a 'theory of change' or similar.	Yes
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	Yes
- Supporting the development of plans to improve the use of evaluation information.	Yes
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes
<b>3. Please provide examples of your previous experience and success in delivering these types of support:</b>	
<p>I have been working for the last eighteen months with Literature Wales and the Ministry of Stories to strengthen their internal evaluation processes. This has involved using logic models to create an evaluation framework and supporting staff to create appropriate evaluation tools and analyse data. Work with Ministry of Stories is now complete and they are using their findings to strengthen practice, to refine their evaluation processes further and to devise a methodology to enable them to articulate the creative value of their work more clearly.</p>	

Work with Literature Wales has involved training for the whole staff team and will include a presentation to SMT on the learning from implementing the pilot evaluation framework. During 2013-2015, I led the small team which evaluated Arts Council Northern Ireland's innovative Intercultural Arts Programme. This involved working closely with the Policy Unit to refine their proposed evaluation methodology to make it more user-friendly and ACNI have used the findings of the evaluation report to identify priorities for the next stage of their Intercultural Strategy.

From 2013 -2016 I supported National Theatre Wales in their evaluation of TEAM and in particular, a leadership initiative with their network of engaged supporters across Wales. This programme of work was funded by PHF and NTW have used the evaluation findings to strengthen the work of TEAM, advocate for the benefits of this kind of approach in the sector and to inform a proposed More and Better application to PHF. I suggested, and have delivered, a programme of training and mentoring support for younger practitioners interested in developing skills in evaluation, as part of this work

Further examples of my practice can be given if required

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	Yes
Arts-based Learning	No

**5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.**

Much of my previous work has been in the field of arts access and participation (for example, with Literature Wales, Ministry of Stories, Royal Exchange Theatre, M6 Theatre). In the past, I have carried out evaluation work for Music Action Zones, for Curious Minds and for local authorities. I have a broad knowledge of what a range of funders need to see in evaluations, which I combine with an understanding of what voluntary sector organisations need to explore to strengthen and develop their practice and a sense of what is realistic and achievable given the many other demands on their time.

I have less experience of evaluating programmes which are focussed on migration and integration, with the exception of ACNI's Intercultural Arts Programme, which addressed precisely these issues. I have also worked directly as a practitioner with refugees and asylum seekers.

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

I use logic models to develop frameworks with organisations. My skills are primarily qualitative and I use one-to-one interviews, focus groups, observation, specifically designed questionnaires, and e-questionnaires, desk research and the triangulation of data to inform analysis.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

I have experience of working with organisations to develop their strategic plans. I am currently working with Octagon Theatre Bolton on their 2018-2022 plan and with dance agencies in the North West on a strategic sectoral initiative based on collaborative partnerships. I supported National Theatre Wales to develop their 2016-2019 Strategic Plan.

I facilitate regularly, most recently for Leeds NHS Foundation Trust at a conference for artists, participants experiencing mental health problems, academics and mental health activists and for Manchester City Council at a seminar for arts and cultural organisations from across the city. My Masters degree is in Action Learning and I have run action learning sets.

I find that, for some organisations, the fact that I am also an arts practitioner gives them confidence that I understand the challenges they face and can help them shape evaluations that are both relevant and realistic.

I have acted as a Critical Friend for organisations such as the National Museum of Wales and The Lightbox as part of PHF's Our Museum initiative. I have experience of being a Board member of arts organisations and am currently working in a voluntary capacity to support an Arts, Health and Social Movements initiative in Greater Manchester. I believe these experiences are of value in enabling me to work confidently at different levels in organisations and across sectors.

**PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

With sufficient notice, all regions of England, Scotland, Wales and Northern Ireland.

<p><b>1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including, where relevant, your experience of supporting them to develop their evaluation plans.</b></p>	
<p>Renaishi’s research and evaluation team has extensive experience in supporting charities and social enterprises to evaluate their programmes and understand their impact. Over the past six years we have worked with organisations of all sizes, ranging from projects with one or two members of staff, to multi-million pound grantmaking organisations. We use a range of qualitative and quantitative research methods to support our clients, as well as offering strategic consultancy and advice.</p> <p>Renaishi is itself a social enterprise, and as well as providing research and evaluation services for clients we also deliver employment programmes for people who are long-term unemployed, and a service to support refugee and migrant families with children in school. This helps us to understand the practical realities of running a not-for-profit organisation, and means we have experience of working with refugee and migrant communities as well as people who have been excluded in different ways from wider society.</p> <p>Our evaluation work has included supporting organisations to develop a Theory of Change, developing outcomes frameworks, and broader evaluation design including the use of creative and participative research methods. We recognise that evaluation methods must respect the culture and values of the organisation itself, and we help our clients to understand what type of information will really help their development - rather than collecting data for data’s sake. We believe that evaluation design should focus on service improvement and deepening understanding what makes a programme effective, for the benefit of the people whom it is intended to help. We take a supportive and engaged approach to working with clients, developing strong relationships with staff and volunteers and ensuring that the evaluation process is understood and accessible to all.</p> <p>Please see below for specific examples of the organisations we have worked with in the past, and the types of work we have done with them.</p>	
<p><b>2. Please indicate which of the following types of support you would be able to offer to PHF grantees:</b></p>	
Supporting the development of evaluation plans and frameworks	Yes
Supporting the development of a ‘theory of change’ or similar.	Yes
Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	Yes
Supporting the development of plans to improve the use of evaluation information.	Yes
Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes

**3. Please provide examples of your previous experience and success in delivering these types of support:**

We have recently completed a developmental evaluation for the Centre for Youth Impact, a small team that supports organisations working with young people to evidence the impact of their work. This was the Centre’s first external evaluation, and the team wanted to understand whether their current approach was working, and what the people they worked with valued about their work. We designed the evaluation to address key strategic questions for the Centre, which ultimately helped them to change their delivery model and develop a clearer understanding of what their desired outcomes are, and how best to achieve these given the resources and expertise they have.

North and South London Cares is a young, innovative charity that brings together older people and young professionals to tackle isolation and build a sense of community. We supported them to develop a Theory of Change that reflects their innovative approach, and helps them to describe what they do in a way that respects their values - with both older people and young professionals benefiting from each other, and no divide between ‘volunteers’ and ‘beneficiaries’. We also created an outcomes framework to help the team understand the impact of this approach, and wrote a detailed guide to support them to evaluate their own programmes in future.

We also have experience in more complex data collection, management and analysis for larger organisations. In our recent evaluation of Carers UK’s volunteering programme, we supported the team to design what data to collect, from whom, and when, in a way that would enable them to make significant improvements to the programme but without being too onerous or obtrusive. We also supported the team to make good use of the evaluation information that they have, exploring how to tweak the programme model to make it more effective for people with different experiences of caring, and supporting them to present this information in a way that is accessible to a varied audience.

For Parents 1st, we developed a user-friendly, accessible tool for community volunteers and new parents to assess their needs and aspirations in preparation for the arrival of their baby. We needed to balance the accessibility of the tool, with the need for Parents 1st to demonstrate clear evidence of effectiveness to local commissioners. We did this by interviewing a range of commissioners to understand what type of evidence they would find persuasive that was also feasible for Parents 1st to collect, as well as speaking to service users to understand what they valued about the Parents 1st approach.

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	Yes
Arts-based Learning	Yes

**5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.**

Access and participation are core issues for Renaisi's own delivery programmes. Our Bilingual Advisor service works with migrant and refugee parents and children in London, to support their integration into the school system and wider society. We have developed long-term relationships with the families we work with, supporting them to understand and participate in the education system, and supporting schools to integrate migrant families and celebrate cultural diversity. We run a variety of arts-based activities with children and parents, including a craft-based culture club, and bilingual storytelling project. We have run a number of research and evaluation projects with the service, including the use of 'structured dialogue' participative methods.

Our most recent project involving arts access and arts-based learning is with the Arts Council, to evaluate the new Cultural Citizens programme. The pilot is running in three areas, to engage teenagers from deprived backgrounds in local arts and culture opportunities. We will use a range of research methods with young people including photo diaries, video ethnography, guided reflection sessions and an element of peer research.

We have also delivered a similar research project on widening opportunities through the Community Libraries programme, for the Big Lottery Fund. We were asked to explore how the programme had engaged a wider range of people in their local libraries, and deepened participation in these community spaces. Our recommendations helped to inform policy and practice in promoting diverse community engagement in libraries.

We have recently completed a research and advisory project for the Science Museum, to support them to improve access and participation amongst communities that are currently under-represented amongst the museum's visitors. Our research focused on the medicine galleries, which contain a large collection of cultural artefacts from around the world. We used participant-led focus groups and mystery shopping techniques to explore how visitors with varied cultural backgrounds engaged with different exhibits, and what factors could motivate them to visit the museum in future. Our research has helped the museum to re-think its strategies for engaging migrant communities with its cultural exhibits.

Other work in the field of arts and culture includes a study for the London Legacy Development Corporation into workspace supporting artistic practices in East London, and developing a culture strategy for the Royal Docks partnership in 2015-16.

Finally, we have extensive experience of research and evaluation projects with young people, and involving schools. We have completed two projects for City Year UK, an organisation that places young volunteers in schools for a 'year of service', supporting them to improve the quality of their evidence and strengthen their delivery model. We are currently working on a project for The Wellcome Trust to engage more young people in STEM subjects, which has involved observational research methods with people aged 5-25.

We have also worked with The Prince's Trust on a project to support the most disengaged young people to participate in outdoor opportunities, and with the Centre for Youth Impact which has given us a good understanding of current challenges facing the youth sector.

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

Our team uses a range of research and evaluation approaches, to suit the priorities and needs of the organisations we work with. We are experienced in Theory of Change and logic model approaches, developing outcomes frameworks, indicator/question development and survey design, as well as quantitative methods including statistical analysis. We are also experienced in qualitative methods, including interviewing, focus groups, ethnographic and participatory approaches, and the use of storytelling and creative methods. We use varied qualitative analysis techniques including framework analysis and the development of typologies and case studies, to give deeper insight.

Typically we use a mixed methods approach in any one study, using different methods to answer different types of questions - about process, outcomes and programme design - in the most appropriate way. We have experience in developmental evaluation approaches as well as summative evaluations.

Our researchers have conducted challenging research with vulnerable groups and people experiencing disadvantage, including young people, older people experiencing loneliness, people who are long-term unemployed, carers, refugee and migrant communities, women with experience of violence in the home, and people with physical and learning disabilities.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

- Experience in providing training in evaluation and research methods/approaches
- Facilitation - of workshops, focus groups, and stakeholder groups
- Strategy development and advice
- Organisational change and development - advice and implementation
- Programme design
- Community engagement practice
- Working with Local Authorities and public services including health and education
- Research projects and literature reviews
- Policy briefings
- Behaviour change literature and methodologies

**8. PHF awards Explore and Test grants to organisations based across the UK.**

In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).

UK-wide



## Donald Ritchie

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<b>1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including where relevant your experience of supporting them to develop their evaluation plans.</b>	
<p>I have worked in the not for profit sector for 27 years, always specialising in organisational development. Over that time I have carried out numerous reviews and evaluations as a staff lead and latterly as a consultant. These range from organisational reviews to evaluations of programmes, projects and core activities. This work typically involves gathering information from a range of sources, analysing it, then working with the key people concerned in order to draw learnings and consider future action.</p> <p>I specialise in strategic planning, an area where good evaluation is vital. My experience includes advising and supporting organisations in: reviewing the performance of their current strategies, research to inform strategic choices, and collaboratively developing future strategy. I have often advised on simple, practical ways to integrate monitoring and evaluation into future plans, and to report on outcomes.</p> <p>My clients span the voluntary sector, from major charities such as Mencap, Amnesty International and the National Housing Federation to specialist and local community organisations. I draw on this knowledge to offer advice and support that's based on good practice, experience of what works best and mindful of common pitfalls.</p>	
<b>2. Please indicate which of the following types of support you would be able to offer to grantees:</b>	
- Supporting the development of evaluation plans and frameworks	Yes
- Supporting the development of a 'theory of change' or similar.	Yes
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	Yes
- Supporting the development of plans to improve the use of evaluation information.	
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes
<b>3. Please provide examples of your previous experience and success in delivering these types of support:</b>	
<p><i>Supporting the development of evaluation plans and frameworks.</i> As Senior Consultant for strategy and impact at the National Council for Voluntary Organisations (NCVO) I was involved in developing bespoke approaches to evaluation for the UK not for profit sector, including through the Measuring Social Value project which proposed a user-friendly methodology. My consultancy work with NCVO's charity clients helped to test and refine these approaches, in particular through supporting them to track, review and report on delivery against their strategic goals.</p>	

*Supporting the development of a 'theory of change' or similar.* I first used Theory of Change whilst working at Friends of the Earth in the 1990s, and found it to be a powerful tool for planning campaigns to maximise the chances of success. Since then I have used a ToC approach with my clients to help them focus on their real-world impact and develop meaningful strategies which can deliver on that – this is typically an inclusive process, embracing all perspectives and preferably through stimulating, interactive discussions.

*Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis.* I have extensive experience as a trainer, including at NCVO where I developed and ran highly rated courses on strategy, campaign strategy and impact. These all looked at uncomplicated ways of obtaining data and making best use of it in order to achieve better outcomes and impact. As a consultant I draw on this toolkit to advise on the most suitable approaches for each client's circumstances, and also support them so that they can do it themselves without the need for external help.

*Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.* I have experience of the tendering process from both sides, having both commissioned projects and tendered for them on many occasions with values ranging from the modest to £0.5m. As an experienced organisational development consultant I should be happy to support others through this process.

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	Yes
Arts-based Learning	Yes

**5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.**

My main experience in these areas is through PHF's Fitter for Purpose programme, which supported 28 grantees in fields such as strategy, funding and governance.

I am not an issue specialist however – my expertise is in organisational support, for which I draw on my wide-ranging experience across the not for profit sector from social care and housing to the environment, community and grassroots action. This enables me to look at an organisation's specific needs in the wider context, without preconceptions about its area of activity and often with some fresh perspectives.

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

I believe that there are only two reasons to measure outcomes – to know (rather than assume) that an activity or strategy is making a difference and learn from that, and to tell others about it. The first step in my approach is to clearly understand the desired outcomes that are to be evaluated and how they deliver on organisational mission. In light of this, my guiding principles for proposing a suitable framework are that it should be:

- Proportionate – to the nature of the organisation and to its need for the data

- Purposeful – to gather only the data that is needed and in the most expedient way
- Appropriate – user-friendly and integrated with other activities where possible

I draw upon my experience to do this, much of which is grounded in methodology developed by the Charities Evaluation Service, New Philanthropy Capital and others. For example a simple evaluation plan is likely to comprise: a clear endpoint to measure, indicators, methods and means of collection, and the intended usage for the data.

I find that the Theory of Change approach is helpful where an overall outcome isn't fully defined and/or where its longer-term organisational relevance isn't clear. My approach is strategy-based, focusing on the endpoint first – the outcome or impact and how that best progresses the organisation's mission – and then carefully working backwards from there.

I take a collaborative approach to my work, seeking to advise on and co-design projects where possible. This is because organisational fit is as important as any methodology in my view, and people are more likely to deliver on plans that they understand and have a hand in shaping. I particularly enjoy working with smaller to medium sized organisations.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

I offer broad-based organisational development support. The areas I specialise in are bigger picture – strategic reviews, developing strategy and managing change. I also offer training in these areas, and as my approach is participative I have significant experience of designing interactive discussions and facilitating groups of all sizes.

For more information please see: [www.donaldritchieconsulting.co.uk](http://www.donaldritchieconsulting.co.uk).

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

I am London-based, and happy to travel anywhere in the UK providing there is reasonable advance notice.

**Roz Stewart-Hall**

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1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including where relevant your experience of supporting them to develop their evaluation plans.

My interest in evaluation emerged through action research that I conducted for PhD, which I completed in 2000. Since then I have developed creative, inclusive evaluation processes and nurtured a wide range of organisations' potential to evaluate their work. For example, I have worked for [Tate](#), [Knowle West Media Centre \(KWMC\)](#), [Real Ideas Organisation \(RIO\)](#), [Diverse City](#), [Extraordinary Bodies](#), [Youth Music](#), [Imagineer](#), [Funky Llama](#) at Theatre Royal Plymouth and [Cirque Bijou](#).

I have supported people to plan and evaluate programmes across disciplines, practices and art forms, including music, visual arts, socially engaged practice, theatre, outdoor arts and circus. I have also worked in non-arts contexts and have supported a wide range of voluntary and third sector organisations to develop evaluation processes and frameworks, as well as theories of change and organisational strategic development.

I support the development of evaluation plans and activities that will ensure meaningful opportunities for all involved to reflect on what they have done and the value of that activity. Such opportunities nurture an explicit sense of the learning and development that have taken place. This is important as it contributes to the difference made by any one project or programme in a positive way, developing greater outcomes for all involved. This process of evaluation supports all involved to identify what has happened, what has been positive, the learning points, and pertinent ways forward, within or beyond any one project, thereby contributing to learning and project development. The approach also generates qualitative and quantitative evidence that can be used to articulate what has happened and the difference it has made.

**2. Please indicate which of the following types of support you would be able to offer to grantees:**

- Supporting the development of evaluation plans and frameworks	Yes
- Supporting the development of a 'theory of change' or similar.	Yes
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	Yes
- Supporting the development of plans to improve the use of evaluation information	Yes
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes

**3. Please provide examples of your previous experience and success in delivering these types of support:**

I have worked across a wide range of contexts and have learned a great deal from the expertise situated across these contexts, enabling me to refine my approach to ensure evaluation plans that are relevant to all involved in a process. I have learned that it is essential to co-devise evaluation activities with those involved in order to ensure the relevance of those activities. For example, recent work with 'About Now-ish' focussed on devising opportunities for people who engage with the world in sensory ways, to reflect on and express responses regarding their experience of projects.

Across all freelance contexts I support the development of evaluation plans and frameworks, for example, I supported all partners to develop the guide to evaluation used as part of the Tate led *Circuit* programme. As part of such planning, the aims and objectives of any programme or project are revisited to enable planning for integrated, embedded qualitative and quantitative evaluation processes and activities.

In most contexts my work involves developing the evaluation expertise of non-specialists. This is mainly because of the benefits that are apparent when evaluation is conducted by an organisation's team. The learning that takes place when team members conduct evaluation activities is irreplaceable; it directly informs future project work and organisational development as well as contributing to CPD, in more enriched and meaningful ways than if the activities were conducted solely by an external evaluator.

In many contexts it is also important to support people to develop skills to make the most of the evidence generated. This often involves developing plans to improve the use of evaluation information, so that it informs ongoing project development, as well as supporting people to use the evidence effectively to articulate the value of the work through reports and wider dissemination. For example, at KWMC I support all members of the team to develop skills in:

- Planning relevant and embedded evaluation processes
- Gathering data through creative and meaningful opportunities to reflect
- Analysing data and using it to inform project development
- Using qualitative and quantitative data as part of reporting
- Using data in case studies or academic papers to articulate the value of work

As part of the Tate *Circuit* programme, my role included supporting young people taking part in the programme to evaluate their experience. These young evaluators for the programme were from a wide range of backgrounds and brought with them a wide range of experiences and knowledge, but were all inexperienced in evaluation at the outset. During the programme, with my support, they had articles published, presented findings at conferences, informed project direction at their own galleries and wrote articles for the [project website](#). Such opportunities, to disseminate findings from evaluation, are useful motivation for the analysis of evidence and reflection upon findings.

In my role as principal consultant at The Evaluation Trust one of my responsibilities was to develop evaluation briefs then select and commission evaluators from a pool of freelance associates, in response to the Trust's commissions. I thereby have significant experience of such processes, including identifying the essential characteristics of an evaluator's approach to ensure the right match with organisations.

**4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):**

Arts Access and Participation	Yes
Shared Ground (migration and integration)	No
Arts-based Learning	Yes

**5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.**

Most of my experiences, knowledge and skills of evaluating or supporting the evaluation of work are in the contexts of Arts Access and Participation. For example, widening access and developing participation was key to *Circuit* aims. The focus for many young evaluators was exploring how far *Circuit* addressed inequalities of opportunity and looking at the systematic problems preventing participation. This is evidenced most clearly in a [young evaluators' round-table discussion](#) that took place towards the end of the programme. It is also evidenced in young evaluators' blogs and papers, such as Hyland's '[The Trouble with Youth Voice.](#)' I also have experience of working in contexts of Arts Based Learning, in schools and colleges. For example, I supported the [Real Ideas Organisation](#) (RIO) to develop an evaluation framework to evaluate the impact of the stakeholder engagement programme, in the development of public art as (an integral) part of new BSF school buildings in Bristol and Bridgwater. During this work I supported students in eight secondary, four primary and four special provision schools, to evaluate the impact this work had for them, for their own art based learning and for the wider school and community, as well producing [reports](#).

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

I am experienced in a wide range of qualitative and quantitative evaluation methods and approaches, as well as action research approaches and devising bespoke processes and tools. This includes facilitating, as well as planning, bespoke methods for sense making, including creative and movement based exercises, peer interviews and goldfish bowl exercises. I am experienced in producing equalities monitoring forms, evaluation guides, topic guides, questionnaires, surveys and tools for creative and inclusive evaluation approaches. I have considerable experience in co-creating evaluation tools as is especially pertinent within co-design and co-creative approaches and processes of socially engaged arts practice and participatory arts contexts. I am experienced in conducting interviews and in supporting others to develop skills in interviewing.

What is important about my approach is that I am practised in working in responsive ways, drawing on my experience of using a wide range of methods, to devise an evaluation approach, framework, activities guide and other tools that are relevant, pertinent and meaningful to every different context. For example, when facilitating sense making with Diverse City's partner organisations, it was important to evidence, amongst other things, the difference that working with Diverse City had made to partners' programmes and infrastructure, in terms of them becoming more inclusive. Given this ambition of the programme I devised a partners' sense making session to conclude with a 'declaration of intent form' for partners to complete. Partners listed the future plans for inclusive practice at their organisations and signed the form. The consequent content of this form clearly articulates the difference that the work has made for the future of these organisations, as a means of evidencing an increase in inclusive practice. What is also important is that the form prompted partners to clearly articulate and sign up to a set of future intentions regarding their own inclusive practice.

For further example, recently when working with Rounded Rhythm, an inclusive dance programme working to engage young people who face barriers to engagement in arts activities, due to additional needs including learning disabilities, physical impairments or

emotional and mental health needs, we devised a range of bespoke activities for the young people engaged. These activities included using photos of past activities to remind people of what they had done before, and asking them to place stickers on the photos to indicate their favourite activities. This helped to encourage a reflective moment for those young people who had very limited recollection or communication. Such activities meant that all the young people could reflect and comment upon their experience, using their own different abilities and overcoming different barriers that might more usually exclude them from having such input. What has been important in this and other contexts is working with and being informed by the expertise of those delivering projects to devise relevant, meaningful exercises for reflection and evidence generation.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

I am experienced in facilitation, training, developing co-creative approaches and action research processes. I am experienced in embedding evaluation into wider organisational mechanisms and structures so that they inform programme development. I am also trained as a doctoral supervisor and familiar with developing research programmes.

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

I am based in Bristol and can travel anywhere if expenses and travel time are paid.

**1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including, where relevant, your experience of supporting them to develop their evaluation plans.**

York Consulting has operated for over 25 years working closely with community and voluntary organisations to assist them in evaluating their programmes of support and core work. Our recent engagement with voluntary organisations is detailed below.

Work with Barnardo's: We have evaluated several programmes in partnership with Barnardo's to evidence the impact of their support on young and vulnerable people. Our recent work includes, assisting them in developing the evidence to demonstrate the impact of their support working in partnership with Lambeth and Southwark Youth Offending Services to help young men involved in gang related activity to turn their life around. This involved developing a Theory of Change with Barnardo's that tracked the assumptions through support and challenge to desistance. It also required a comprehensive suite of evaluative tools (questionnaires and action research) to be integrated in to the evaluation.

We have worked in partnership with many carer organisations (Carers Association South Tyneside, Sheffield Young Carers, Leeds Young Carers, Bolton Young Carers, as well as the Carers Trust) to help develop capacity to evaluate their own services. This has included training on setting up evaluation frameworks, identifying key stakeholders, identifying key short, medium and long term outputs and impacts to help organisations agree on their key activities and longer term goals. We often use the Prove It Toolkit<sup>1</sup> that provides a suit of evaluation tools that can be tailored to the needs of individual organisations and goals. This starts by asking clients do develop a story board of their project including articulating:

- how a project's intended activities will lead to change.
- what that change will look like.
- the best ways of knowing (indicators) that it is happening.

We worked in partnership with Carers Trust to support them in determining their key framework and outcomes that shaped the data they were required to gather. The evaluation has just been successfully completed and will be available on their website shortly

Peer Research - we have worked with youth centres, charities and work based learning providers to train young people to help design and administer closed questionnaires, trained young carers to carry out focus groups with other young carers and as part of our work with Railway Children, operated through a panel of young people who have experienced running away from home to advise on question areas and recommendations. Recently we have supported organisations to access Big Lottery Funds by helping them develop their evaluation strategies within the proposal. Our ongoing work with Grand Parents Plus to evidence the impact of their Kinship Carer Support Model is an example of this. We have discussed the new focus and opportunities to improve the evaluation strategy by building on existing evidence base to ensure the evaluation is rigorous and capture the various dimensions of their work including case support and advocacy, befriender support and local network support groups.

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<sup>1</sup> NEF Consulting



We believe in the use of validated tools such as the Warwick and Edinburgh Mental Wellbeing Tools, the Family Assessment Device and the MacMaster Tool to evaluate impact.	
<b>2. Please indicate which of the following types of support you would be able to offer to PHF grantees:</b>	
Supporting the development of evaluation plans and frameworks	Yes
Supporting the development of a 'theory of change' or similar.	Yes
Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	Yes
Supporting the development of plans to improve the use of evaluation information.	Yes
Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	Yes
<b>3. Please provide examples of your previous experience and success in delivering these types of support:</b>	
<p>York consulting has been supporting the Southbank Centre to assess its social and economic impact. This has involved conducting a baseline assessment based on existing evidence and segmenting themed impact areas; business; economy; education; young people; equality; community; performance. The analysis has been instrumental in a re specification of organisational objectives linked to measurable outcomes.</p> <p>Our current work with the BBC Children in Need programme is supporting them in establishing a new Theory of Change for the use of a new Emergency Crisis fund that evidences change at different levels of impact (community, organisation and individual).</p> <p>We understand a range of data collection methods and tools having worked across a wide range of projects from large central government funded programmes such as the Evaluation of Think Family, Evaluation of Targeted Youth Support for the DfE and for Paul Hamlyn, Evaluation of Musical Bridges and Musical Futures. We understand the benefits and sometimes challenges in generating data, such as qualitative and quantitative data and will work with clients to determine the most advantageous methods of data collection.</p> <p>We can take clients through the various options such as the use of Survey Monkey or Snap which are free or cheap forms of quantitative data generation methods. We have used this approach with Grandparents Plus and Enfield Borough Council and found these methods to be very easy to understand.</p> <p>There is nearly always the need to generate project monitoring data to evidence the extent of engagement, support and outcomes. We will support clients in establishing appropriate project monitoring and reporting methods and to determine the necessary outputs in order to evidence programme performance. We are currently working with Enfield Borough Council to determine a range of indicators on their family support hub programme.</p> <p>We recently worked with Carers Trust to help them develop a specification for the cost benefit analysis of the About Time programme. As a result of the process, New Economics Foundation were appointed and the cost benefit was successfully completed.</p>	

<b>4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):</b>	
Arts Access and Participation	Yes
Shared Ground (migration and integration)	Yes
Arts-based Learning	Yes
<b>5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.</b>	
<p>We have evaluated many projects where arts therapy has been used for young people suffering from low level mental health, anxiety or attachment disorders. These have been delivered for a number of carer organisations where services are working with young people who are suffering from bereavement, or from low self-esteem due to being bullied. Evaluation methods have mirrored the art based therapies by using a range of arts based approaches to encourage people to describe how they felt before and after the support. This could include making a short video, writing a short story, or just drawing pictures which express feelings and asking the participant to talk about the picture.</p> <p>We have also evaluated a youth engagement programme on behalf of a youth service in Leeds where creative learning opportunities were delivered as part of a wider programme of support for young people who were NEET and were involved in range of criminal and anti-social behaviour. The learning opportunities included how to use DJ decks, and learning how to develop personal expression through painting and drawing. These present challenges in evaluating the impact in consistent ways across participants but instead situate the impact in a very subjective experience. This has considerable value for understanding the impact of support on individuals. Panels of participants can provide feedback on their experiences in a more general way which helps understand the impact across a broader number of people. We have used this approach for the Cardigan Centre in Leeds.</p> <p>We have evaluated projects on behalf of the Welsh Assembly Government who have contracted with the Workers Education Association (WEA) who have developed unique approaches to engaging adults in learning by embedding literacy and numeracy support in craft based courses such as Dry Stone Wall short courses and community based social history courses. These types of learning opportunities helped engage adult learners who had been out of learning for a number of years but were engaged in learning through other interests.</p> <p>Our work with clients that support Asylum Seekers is limited to some local authority work, but also work with a minority ethnic support group that helps migrants coming to Leeds to settle. This has included the evaluation of support to help people access their welfare benefits and also a range of language classes to help them learn English.</p> <p>We have both delivered work for PATH Yorkshire and worked in partnership with PATH to evaluate the impact of programmes on people from a range of minority ethnic backgrounds. Our Integrate Evaluation for PATH Yorkshire, was a two-year Home Office funded project supporting women who have migrated from developing countries with learning needs in basic skills in English, Maths and UK cultural familiarisation. Black and Minority Ethnic (BAME) women from countries outside of the European Union ranged from those with high levels of education but poor basic skills in English through to those who were less well educated.</p>	

Fieldwork included focus groups and one-to-one interviews with women to determine how the learning was adapted to their needs and to determined other elements of support needs they may have including access to health and children's services.

Evaluation of the Child Development Grant – Department for Children, Schools and Families (DCSF). Our work with communities from Black and Minority Ethnic (BAME) background includes an extensive pilot programme evaluation covering ten local authorities testing whether incentives and action plans offered to parents from BAME to engage in Children Centre provision had a subsequent impact on outcomes for the most disadvantaged parents and children. Our research included qualitative interviews with LA staff and Children's Centre Managers, together with a two-year multi-method large scale longitudinal survey of parents/guardians. Our research Tower Hamlets, Ealing, Lambeth and Bradford. Interviews were conducted in a range of languages using interpreters.

**6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.**

We are experienced in a wide range of evaluation methods. We have over 25 years of experience of evaluation. We use qualitative and quantitative methods of gathering data from:

Questionnaires, both online, telephone and postal; Structured to semi-structured and unstructured interviews; Use and analysis of the Outcomes Star where progress is measured over time periods; Use of young person focussed methods where we use a range of resources such as magazines, film, diaries to encourage reflection  
We can provide training on setting up evaluation frameworks, action research, peer research and fiscal return on investment studies.

**7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.**

In 2013, we facilitated York and North Yorkshire Forum joint strategy on developing a stronger infrastructure as part of the Big Lottery Funding for Transforming the Local Infrastructure.

We can undertake training on the use of certain tools such as online tools, or how to draw on the experts of users in shaping evaluation questions and in undertaking field work (peer research).

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

All areas of the UK including Northern Ireland.

Hannah Wilmot

[Hannahwilmot@talktalk.net](mailto:Hannahwilmot@talktalk.net)

<b>1. Please describe your previous experience of working with not for profit organisations to evaluate their work, including, where relevant, your experience of supporting them to develop their evaluation plans.</b>	
<p>I have worked as an independent evaluator for 25 years having previously worked for Battersea Arts Centre, Riverside Studios and London Arts Board as Education Officer. I have worked with a wide range of not for profit organisations including Bridge Organisations and the Arts Council of England; large cultural organisations such as Tate and the National Theatre; small arts organisations such as Box Clever Theatre Company in London; and voluntary organisations such as the Josef Herman Art Foundation Cymru in the Swansea Valley.</p> <p>I am interested in the role of evaluation in learning and improving practice; helping clients understand the difference their work is making and the implications for future programmes. My aim is to spread ownership and insight amongst partners and I adopt an approach that is collaborative, engaging and responsive: collaborating with clients and project partners to ensure shared understanding and agreement on methods and tools, and to share and embed project learning; engaging partners and participants in conversation and reflection within a framework where expectations are clear and findings are shared; and responsive to the varied environments and changing circumstances as the project evolves.</p> <p>I principally employ qualitative research methods but can also advise on and analyse quantitative data.</p>	
<b>2. Please indicate which of the following types of support you would be able to offer to PHF grantees:</b>	
- Supporting the development of evaluation plans and frameworks	✓
- Supporting the development of a 'theory of change' or similar.	✓
- Developing the evaluation expertise of non-specialists, which may include advice on planning, data collection, analysis etc.	✓
- Supporting the development of plans to improve the use of evaluation information.	✓
- Supporting the development of evaluation briefs/tenders, selecting and commissioning evaluators.	✓
<b>3. Please provide examples of your previous experience and success in delivering these types of support:</b>	
<p><b>Evaluation plans and frameworks:</b> I have extensive experience of supporting the development of evaluation plans and frameworks. I endeavour to engage as many stakeholders as possible in this development to increase ownership of the framework and support partnership development.</p>	

Funded by the PHF, I recently supported grantee Fun Palaces to review their approach to evaluation. I worked with the central staff team to devise a national evaluation framework and then facilitated a workshop with the five regional Ambassadors to customise this framework in response to regional needs and circumstances. Following my consultancy, the Co-Director wrote, *'It has really been great working with you - so useful and informative - I've learned so much. Thank you for taking us on board just as we are - you never tried to push us where we couldn't go and as a result I think we have come up with a really useful and essential framework for our future.'*

**Theory of change:** As with evaluation frameworks, I find that the process of developing a theory of change is equally as useful as the resulting document. Engaging partners in discussions about the steps and changes required to reach their goals can reveal assumptions and contextual considerations that can inform both the evaluation and project development. In 2015, I evaluated 'Open Doors' a social action programme funded by the Cabinet Office which aimed to improve the life chances of vulnerable young people in West Dorset. I worked with the Centre Manager, youth workers and volunteer mentors to develop a theory of change which became a visual aid for all partners to locate their own role within the complex journey of change the programme aimed to facilitate.

**Evaluation expertise of non-specialists:** Working with an external evaluator can be expensive and I believe it is important to improve the skills and confidence of staff to increase the capacity of an organisation to undertake future evaluations. Between 2013-2016, I evaluated an HLF-funded partnership programme linked to the digitisation of the archive at Tate Britain. Over the four years, five organisations, (Tate Britain, the Josef Herman Art Foundation Cymru, Tate Liverpool, Turner Contemporary in Margate and the Laing Art Gallery in Newcastle) worked with a range of partners to develop learning programmes linked to archives and heritage. Together with programme evaluation, I acted as a critical friend and provided support, advice and training for lead organisations and their partners including schools, youth and community organisations, health trusts and arts organisations.

**Improving the use of evaluation information:** We need to ensure we are consistently gathering reliable and useful evaluation information and once gathered, make sense of what it tells us and how we can learn from this. Having worked as an evaluator and researcher with A New Direction (the Bridge Organisation for London) for a number of years, in 2016, I took on a consultative role to embed good practice in evaluation across the organisation. This involved reviewing existing approaches, providing advice and support to individual staff and providing whole staff training on evaluation. As skills and confidence increased, we looked at how evaluation data was analysed and thereafter, how findings were shared and used (internally and with the sector) to improve practice.

**Evaluation briefs and commissions:** In 2015, the Contemporary Visual Art Network (CVAN) was planning to appoint a national evaluator and I was approached to help them write a brief. I facilitated a workshop with regional network leads to review the organisation's mission, values and existing evaluation methods, and discuss what they needed from the national evaluation. I used the outcomes from the workshop to design a brief and also participated in the appointment of an evaluator.

<b>4. Please indicate which of the following funds you would be interested in supporting (further information about these funds is available on the PHF website):</b>	
Arts Access and Participation	<input checked="" type="checkbox"/>
Shared Ground (migration and integration)	<input type="checkbox"/>
Arts-based Learning	<input checked="" type="checkbox"/>
<b>5. Please provide evidence of your previous experience, knowledge and skills of evaluating or supporting the evaluation of work in the relevant fund areas that you have selected.</b>	
<p><b>Arts Access and Participation:</b> From 2016-18, I was the evaluator for Tate Exchange, 'A space for everyone to collaborate, test ideas and discover new perspectives on life, through art.' This large-scale public engagement programme operates at Tate Modern and Tate Liverpool and involves collaboration with over 60 partners (from the cultural, education, health and not-for profit sectors) and the public to explore how art makes a difference to people's lives. My role was to coordinate the evaluation, facilitate ongoing reflection, provide professional development and write formative and summative reports.</p> <p><b>Arts-based Learning:</b> I undertook a range of evaluation projects for Creative Partnerships in London and the South-East and have also undertaken evaluation for arts organisations working with schools such as Theatre Centre and Eastside Educational Trust. Between 2014-16, I evaluated the first and second iterations of a year-long professional development programme for middle and senior leaders in schools run by A New Direction in London. I am currently undertaking the evaluation of <i>Leaders for Impact</i>, a similar programme for senior school leaders in the Thames Valley supported by the Royal Opera House Bridge.</p>	
<b>6. Please provide an overview of the evaluation methods and approaches that you are experienced in, including details of any specialisms.</b>	
<p>I use theory of change and evaluation frameworks to clarify intended outcomes and impact with associated indicators of success. I principally employ qualitative evaluation methods including interviews, focus groups, observation, questionnaires and creative techniques such as storytelling. I adopt mixed methods, designing each evaluation study to meet the requirements of the client and the project.</p>	
<b>7. Please provide brief details about any other experience or skills that you feel may be relevant. This may include, for example, supporting organisational change or strategy in not for profit organisations, advising on ethics and data protection, providing training or facilitation, or undertaking research that is not specifically evaluative.</b>	
<p>I often facilitate workshops (e.g. for PHF on the evaluation of participatory arts), training (on evaluation for education and arts professionals), reflection and peer learning sessions (e.g. on ACE Quality Principles for A New Direction and on Gold Arts Award for ROH Bridge).</p> <p>I also undertake writing (such as case studies and 'how to' guides) mostly linked to research such as <i>Addressing the Dynamic</i>, a research project and publication for Trinity Laban Conservatoire of Music and Dance on relationships between artists and project managers (supported through the PHF Special Initiative, ArtWorks: Developing Practice in Participatory Settings); and <i>Working with Young Cultural Leaders</i> for ROH Bridge.</p>	

**8. PHF awards Explore and Test grants to organisations based across the UK. In most instances the evaluation support will be provided remotely, but in some cases travel will be required for which expenses will be paid. Please indicate the areas that you would be willing to travel to if this was requested (country / region).**

I am based in London but happy to travel throughout the UK.