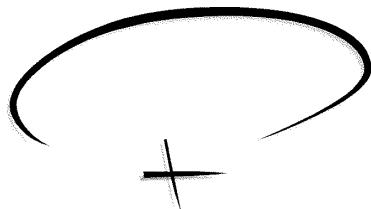


Long-term outcomes evaluation of SCOPE



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SCOPE long-term outcomes evaluation summary

BACKGROUND TO THE EVALUATION

The SCOPE programme was initiated by the Tindall Foundation (TTF) in 2005 to provide capacity-building support to small not-for-profit organisations (NFPs) and was piloted over a two year period with 47 community-based organisations in the greater Auckland area. A formative evaluation of SCOPE was undertaken during the same period which showed that SCOPE had significant positive outcomes for many of the participating organisations. The pilot concluded in 2007. TTF sought a long-term impacts/outcomes evaluation to gauge whether, to what extent and in what ways SCOPE had been effective in helping community organisations to (1) provide services for their community and (2) more effectively deliver on and/or develop their intended purpose.

EVALUATION APPROACH

The mixed-method approach involved four case studies and a survey of all organisations that had been supported by SCOPE. A self-completion questionnaire containing a mix of quantitative and qualitative items was sent to the 47 SCOPE organisations, and responses were received from 25 organisations (53%). In addition, four organisations were invited to take part in evaluation case studies. They were selected to represent (1) two organisations seen by SCOPE advisors as having made major gains from SCOPE support and (2) two whose gains were seen by advisors as having been limited.

POSITIVE OUTCOMES OF SCOPE SUPPORT

The survey data demonstrate a **high level of gain** (average 4.24 on a scale with a top score of 5) from the organisations that responded, on improvements in: management and governance; improved internal relationships; ability of the organisations to identify and address problems; improved systems; clarity of purpose and direction; and ability to deliver a service based on the organisation's intended purpose. In addition, respondents reported **high levels of maintenance of gains** over time from SCOPE support. (It needs to be noted that there was a potential for sample bias, in that organisations that gained greater benefits from SCOPE support may have been more likely to respond to the survey, and at least four organisations were no longer in existence). Even so, the data in **Table 1** demonstrate that at least half of the SCOPE organisations attributed major capability and capacity gains in a broad range of areas.

MOST SIGNIFICANT AREAS OF CAPACITY AND CAPABILITY GAIN

The changes attributable to SCOPE support that were described commonly by survey respondents as 'most significant' are shown in **Table 1**.

TO WHAT EXTENT HAVE THE GAINS BEEN SUSTAINED?

The large majority of survey respondents believed that the gains from SCOPE support had been sustained, and that they continued to benefit from those gains and to build on them. Respondents variously described their organisations undertaking additional work since SCOPE to build capabilities, including training and mentoring, and some had sought and obtained additional funding to hire expertise for that purpose. In summary, more than half of the organisations supported by SCOPE experienced substantial capacity and capability gains

from the SCOPE support in a range of areas, and many identified ways in which those gains had contributed to improved quantity and/or quality of services to clients or communities.

Table 1: 'Most significant' changes for organisations	
Area of change	Percentage of respondents (n=25)
Improved organisational systems	64
More effective governance and/or management	44
Acquisition of skills	29
Better financial management and accountability	29
Improved strategic planning	29
Improved quality or quantity of service delivery	29
Improved internal relationships	24
Learning the value of learning and mentoring	24

DID SCOPE SUPPORT CONTRIBUTE TO IMPROVED SERVICES TO CLIENTS AND COMMUNITIES?

A majority of respondents were able to attribute improvements in service delivery to SCOPE support. Survey respondents' agreement ratings averaged 4.0¹ on the item 'Improved the quality and effectiveness of its services to the community', and six respondents (29%) spontaneously identified service improvements as one of the most significant changes attributable to SCOPE support.

Increases in services

Even though only one respondent spontaneously identified increased funding or personnel capacity as significant changes, in fact seven organisations (33%) increased their annual incomes by at least \$50,000 from 2006/7 to 2007/8, and seven (33%) increased their paid workforce (full-time and part-time staff) in the same period. Across respondents, organisations described increases in services in the range of 25% to 300%. In addition, 10 organisations (48%) had increased their volunteer workforce. Each of these gains can reasonably be seen as an indicator of significant increases in services.

Quality improvements to services

Service quality improvements described by survey and case study respondents were:

- Services becoming more client-focused (e.g. service transparency; internal monitoring and evaluation of service delivery; more empowering approach to service delivery) (48%)
- Better service delivery because of increased staff numbers, including volunteers (43%)
- Improved service accessibility to clients, resulting in greater contact numbers (38%)
- Increased service availability due to expansion or streamlining (29%)
- Safer client environment due to a better client focus (24%).

Several organisations, including some serving communities rather than 'clients' (e.g. arts and conservation organisations), noted that they had undertaken a greater number and diversity of projects or activities per annum than in the years before SCOPE support. Some organisations also reported a greater diversity of clients in terms of demographic. Some

¹ Rating scale 5 = strongly agree and 1 = strongly disagree with the questionnaire statement.

organisations were also able to identify improved client outcomes from formal monitoring and evaluation. In summary, a majority of organisations believed that SCOPE support had contributed directly or indirectly to improved and/or increased services.

"We'd pretty much been making it up as we went along before... We came out enabled – new skills, new knowledge, new processes, and feeling like we really knew what we were doing for the first time."

SCOPE STRENGTHS AND SUCCESS FACTORS

The features of SCOPE that respondents found most valuable to them were aspects of the model and reviewer/advisor attributes and/or approach, in particular:

- Tailored intervention
- The focus on capacity-building
- Bringing the organisation's personnel together to review and plan
- A good 'fit' between the organisation's personnel and the advisors
- Being provided with planning and problem-solving processes
- The mentoring component of the consultancies
- Becoming linked into NGO networks.

The most important and useful aspects of SCOPE support appeared to be the ability of the reviewers and advisors to work in ways that the organisations experienced as supportive and felt were focused on their identified needs, at that time that the help was needed, in their preferred style of operating, and that had provided real learning for them.

IMPROVEMENTS TO SCOPE

While the majority of evaluation respondents were very satisfied with SCOPE's delivery, several identified concerns. The main issues were around a lack of continuity from the SCOPE reviewer to advisors, together with some perceived failure of some advisors to deliver the particular help that organisations had sought and that had been identified in the organisational review as appropriate. Suggestions for improvement were focused on a better advisor allocation process, a better transition process from reviewer to advisor/s, and improved processes for monitoring the quality of advisors' work with organisations.

VALUE OF THE SCOPE MODEL

The evaluation findings show that the SCOPE model has been effective in building capability and capacity for at least half of the participating organisations, including both new and well established organisations. For the organisations that responded to the survey, the gains had been incremental, and had given them not only the skills but also the confidence to consolidate and in some cases expand their services to clients and communities. Many respondents expressed strong gratitude to SCOPE for support that had been a turning point in their organisation's sustainability.

1. Evaluation objectives, design and approach

Background to the evaluation

The SCOPE programme was initiated by the Tindall Foundation (TTF) in 2005 to provide capacity-building support to not-for-profit organisations (NFPs), and was piloted over a two year period with 47 community-based organisations in the greater Auckland area. A formative evaluation of SCOPE was undertaken during the same period which showed that SCOPE had significant positive outcomes for many of the participating organisations. The areas of greatest benefit identified were in relation to:

- Achieving a better sense of the organisation's direction and goals
- Helping the organisation to 'get on track'
- Getting clear strategy in place
- A raised awareness of the 'big picture'
- Management and governance skills
- Infrastructure development
- Stability and accountability
- Teamwork
- Morale and confidence.

The degree of benefit appeared to vary according to:

- Organisational income level – greater income level generally resulted in greater gains
- The duration of the consultancy – longer duration resulted in greater gains
- The number of advisors involved – working with fewer advisors generally resulted in greater gains.

Evaluation objectives

TTF sought a follow-up impacts/outcomes evaluation to gauge whether, to what extent and in what ways SCOPE had been effective in helping community organisations to (1) provide services for their community and (2) more effectively deliver on and/or develop their intended purpose. Key evaluation questions were:

- Did SCOPE help them more effectively provide services for their community and to more effectively deliver on their intended (or revised) purpose?
- To what extent and in what ways did SCOPE contribute to making them more effective?
- Have the positive outcomes of the capacity-building been sustained to date? In what ways and to what degree?
 - ◊ For the organisations
 - ◊ For clients
 - ◊ For the community the organisation serves
- Have there been any further consequences as a result of the capacity-building? What were they? Do they expect any further consequences yet?
- Were there any unexpected outcomes as a result of the capacity-building? What were they?
- Were there any negative outcomes as a result of the capacity-building? If so, what were they and to what degree? How do the negative outcomes balance against the positive?

- What aspects of the SCOPE support worked well?
- What aspects of the SCOPE support did not work well? What would have worked better?

These questions were expanded into a set of interview questions and a survey questionnaire (**Appendices 1 and 2**).

Evaluation approach

DESIGN

The mixed-method approach involved four case studies and a survey of all SCOPE organisations. The case studies were undertaken following survey analysis, so that information from the survey could be used to inform questions in the case studies.

SAMPLE

The sample comprised:

- Organisations supported by SCOPE in 2005-2007 ('SCOPE organisations')
 - ◊ 25 survey respondents
 - ◊ Seven people from four organisations who participated in evaluation case studies
- Two SCOPE consultants who had undertaken independent follow-up work with SCOPE organisations.

SURVEY

A self-completion questionnaire was sent to the 47 SCOPE organisations with a covering letter requesting their input and offering to enter respondents into a prize draw². The questionnaire (**Appendix 2**) contained a mix of quantitative and qualitative items, to obtain information on the 'how much impact' and 'what kind of impacts' questions respectively. The questionnaire was piloted with two SCOPE organisations and refined. Organisations received a follow-up reminder to complete the questionnaire. Twenty-five completed questionnaires were returned³ (53% response rate), which is a high response rate for a postal survey. The demographics of survey respondents are set out in **Appendix 3**. Questionnaires often included detailed responses to the open questions.

CASE STUDIES

Four SCOPE organisations were invited to take part in evaluation case studies. They were selected to represent (1) two organisations seen by SCOPE advisors as having made major gains from SCOPE support and (2) two whose gains were seen by advisors as having been limited.

Report presentation

TERMINOLOGY USED

Qualitative evaluation terminology referring to numbers of participants representing a particular view or experience is as follows: 'some' refers to 2-4 respondents; 'several' refers

² Prizes of \$100 book vouchers each were awarded to two organisations in early May 2009.

³ Four questionnaires were returned in late May after the quantitative data analysis had been completed, so their rating data have not been included. However the qualitative data from those respondents are included.

to 5-7 respondents; ‘many’ refers to 10 or more respondents; larger numbers are described as a proportion of the stakeholder group referred to (e.g. ‘a majority’, ‘more than half’).

For the avoidance of confusion:

- ‘Survey respondents’ refers to people who took part in the survey
- ‘Respondents’ refers to all of the organisations that took part in the evaluation, including survey and case study respondents.

USE OF QUOTES

Quotes have been presented verbatim to ensure that respondents’ views are accurately represented, including the intensity of those views. They have been selected to be representative of the views of respondents. Each quote represents the coordinator, manager or trustee of one of the participating organisations.

Evaluation findings

2. Positive outcomes of SCOPE support

The main benefits of SCOPE support were assessed in two ways:

- Survey respondents' ratings of key gains
- Survey and case study respondents' descriptions of the 'most significant' gains to them of SCOPE support.

Degree of sustained benefit from SCOPE support⁴

The survey data demonstrate a **high level of gain** from the organisations that responded to the survey, especially in relation to improvements in management and governance, improved internal relationships, ability of the organisations to identify and address problems. In addition, respondents reported **high levels of maintenance of gains** over time from SCOPE support. It needs to be noted that there was a potential for sample bias, in that organisations that gained greater benefits from SCOPE support may have been more likely to respond to the survey (and at least four SCOPE organisations were no longer in existence). Even so, the data in **Table 2** demonstrate that at least half of the SCOPE organisations attributed major capability and capacity gains in a broad range of areas.

Table 2: Gains attributed to SCOPE support by survey respondents	
Gains attributed to SCOPE support	Agreement⁵
More effective governance and/or management	4.42
Improved relationships within the organisation (e.g. amongst governance, management and delivery personnel)	4.33
Better at identifying problems and acting appropriately to resolve them	4.32
Developed the capability to build on the gains achieved through SCOPE support	4.32
Better organisational systems	4.26
Clearer about the organisation's purpose and direction	4.25
Improved ability to deliver a service based on the organisation's intended purpose	4.21
Become more stable (e.g. in terms of financial management, funding and/or personnel)	4.05
Improved the quality and effectiveness of its services to the community	4.00
Maintenance of SCOPE gains	
Maintained the gains achieved through SCOPE support	4.43
Continued to grow and thrive	4.35
Average rating overall	4.26

⁴ Note re terminology – 'some' refers to 2-4 respondents; 'several' refers to 5-7 respondents; 'many' refers to 10 or more respondents.

⁵ Rating scale **5 = strongly agree** and **1 = strongly disagree** with the questionnaire statement. Ratings are based on returns from 21 organisations.

Most significant gains

The changes attributable to SCOPE support that were described commonly by survey respondents as ‘most significant’ are shown in **Table 3**, and detailed in the following sections⁶.

Table 3: ‘Most significant’ changes for organisations	
Area of change	Percentage of respondents (n=25)
Improved organisational systems	64
More effective governance and/or management	44
Acquisition of skills	29
Better financial management and accountability	29
Improved strategic planning	29
Improved quality or quantity of service delivery	29
Improved internal relationships	24
Learning the value of learning and mentoring	24

IMPROVED ORGANISATIONAL SYSTEMS

Systems that respondents identified as having improved were most often systems for the following:

- Strategic and operational planning
- Establishing, writing and communicating policy
- Internal and external communications
- Financial management (see below)
- Staff recruitment and selection
- Staff job descriptions and performance appraisal systems
- IT systems and capacity
- Risk assessment and regular review of the organisation’s performance, both internally and externally.

The results typically were greater accountability, less internal conflict due to staff’s enhanced clarity in relation to policy and systems, and organisations feeling and being seen as more “*professional*”. Improved systems also meant better succession planning. Some organisations described greatly improved organisational evaluation or audit systems.

“A lot of confusion has gone, so people know what their job is and what it isn’t.”

“A new Manager could walk in tomorrow and know how everything works.”

MORE EFFECTIVE GOVERNANCE AND/OR MANAGEMENT

Gains noted in governance were commonly an improved understanding amongst both governance personnel and managers of the governance role and the distinction between governance and management, leading to a better division of governance and management roles and tasks. The results were better relationships and greater efficiency as managers

⁶ Description of SCOPE gains in those sections include comment from both survey and case study respondents.

were left to do their work and trustees became more actively involved in strategy rather than management.

“Council self-evaluating at end of term... and governance training at beginning of appointment, by outside consultant. [This has] impacted positively on overall continuity of committee.”

Improvements in management identified variously by respondents related commonly to:

- Manager role descriptions
- New or enhanced management systems (e.g. staff and volunteer management)
- Reporting to governance groups
- Management communication to trustees and staff
- Managers acquiring management skills
- Staff performance appraisal systems and key performance indicators (KPIs)
- Undertaking regular risk assessments.

Some outcomes reported were greater job satisfaction amongst managers and managers having more time to spend on fund-raising and management of staff.

“A specific role to coordinate volunteers has been established and this has greatly improved our relationships with volunteers.”

ACQUISITION OF SKILLS

Almost all respondents identified skills gains for managers and/or governance personnel, confirming the capacity-building effectiveness of SCOPE. Skills gains reported were in:

- Undertaking strategic planning
- Risks assessment and risk management
- Policy development and policy writing
- Financial accounting
- Self-evaluation.

As a result of acquiring new skills, organisations quickly gained in confidence and in motivation to build further capabilities (see **Learning the value of learning and mentoring** later in this chapter). Two organisations had achieved provider accreditation – one with Child Youth and Family Services (CYFS) and the other with the New Zealand Federation of Family Budgeting Services.

BETTER FINANCIAL MANAGEMENT AND ACCOUNTABILITY

The most common improvements to financial management were around:

- Financial planning and financial targets
- Accounting systems
- Budgeting, monitoring of expenditure and cash flow forecasting
- Transparency and accountability
- Staff pay bands and payments
- Fundraising strategy and action.

Improvements to fundraising included learning how to write strong funding applications, how to diversify fundraising activity and build relationships with funding agencies. Improved skills and systems in these areas resulted ultimately in greater financial security for organisations, knowing what funding they needed, and in more efficient and transparent financial management, resulting in greater credibility to funders and more successful funding applications. Two organisations noted that staff were now paid more as a result of increased funding and awareness of the industry pay standards.

“We hold six months in reserve funding now, so staff feel safe in their jobs. And we’re all paid more now, so they’re happier too, and its justified because we have performance standards to work to and everyone feels more pride.”

“We didn’t have a budget before, so we had no idea what we needed and no sense of planning or goal-setting. Once we had goals, everyone [Board members] got very excited and more interested...”

“Stability of fund-raising income and continual diversification.”

IMPROVED STRATEGIC PLANNING

Support with strategic planning usually centred on learning how to undertake strategic planning involving staff and communities, how to convert a strategic plan into a business plan, and/or how to monitor the strategic plan. Organisations learned not only how to undertake a strategic planning exercise effectively, but also the value of having a clear plan on which to base the organisation’s direction and activity. Gains in these areas resulted in organisations becoming clearer about the purpose and direction of the organisation and achieving a shared vision for the organisation. This gave people a stronger sense of purpose and resulted in greater harmony. It also led to organisations writing better funding proposals and undertaking better targeted promotion, which resulted in several organisations obtaining significantly increased funding and more skilled volunteers, including trustees.

“Strategic workshop was a significant team-building opportunity for board and staff.”

“Clearer documentation on vision of the organisations to support our communication with funders and decision-makers.”

IMPROVED QUALITY OR QUANTITY OF SERVICE DELIVERY

Areas of improvement to services are detailed in chapter 3.

IMPROVED INTERNAL RELATIONSHIPS AND MORALE

Several respondents specified improved relationships within the organisation as a direct benefit of SCOPE support and some others implied improved relationships (e.g. in survey responses referring to better collaboration amongst staff, or “*happier volunteers*”). Improvements were seen in relationships variously amongst governance, management, paid staff and volunteers. Several respondents commented that their organisations were “*happier*” as a result of greater security and clarity of direction, and better planning and communications systems. Many Boards were operating more harmoniously and therefore

more effectively. Some organisations also identified increased job satisfaction as a direct impact of clarifying the organisation's purpose and systems. One noted that volunteers were easier to retain because of improved relationships, and another noted that their governance group was more stable.

"We have employed skilled staff to run centres that before were run by volunteers thus enabling us to ensure that everyone operates under the same guidelines. This has resulted in... more cooperation and coming together, reducing the feeling of existing in an isolated cell."

LEARNING THE VALUE OF LEARNING AND MENTORING

A major benefit for several organisations was learning the value of investing in capacity-building and paid consultancy for particular expertise. Some organisations had gone on to purchase additional services, particularly in financial management and mentoring. Staff in some organisations had undertaken courses of tertiary study and/or additional professional development through seminars and workshops. One organisation described incorporating professional development plans into their staff's KPIs. Respondents typically described a pattern of change that involved the organisation "*learning by doing*", and, through that, coming to understand not only the importance of systems and planning, but also the value of obtaining expert advice to supplement the knowledge of the organisation in areas where it was lacking. The following quote illustrates that pattern.

"Probably the best learning for us was realising that we badly needed to get our act together if we wanted to get any more funding, realising that we were a bit rough and ready and that that was probably obvious to funders. Then it was about admitting that we lacked some skills on our Board, and that we needed to get those skills, or we'd just continue to lurch along... Once we'd got some better structures and systems, we were simply more efficient, and we were putting together much sharper funding applications backed up by figures... We've got figures now that show that we've trebled the number of calls [requests for service] that we got in the last year, and our funders were impressed with that."

CONFIDENCE AND SELF-ESTEEM

Although few respondents specified increased confidence as an outcome, it was apparent in their responses. For example, many respondents commented on gains such as an improved reputation with the community or funders or within their sector of operation, and/or seeing themselves or being seen as more professional. Immediate increases in confidence occurred by virtue of being accepted for SCOPE support and from the moral support provided by SCOPE reviewers, and these gains were built on as SCOPE advisors provided capacity-building in manageable and achievable steps that resulted in a series of achievements. As organisations became better networked within their sectors though SCOPE, they had yardsticks against which to measure their own progress, which also contributed to their motivation. Improved self-esteem developed as organisations learned that they had valuable strengths amongst their staff, governance personnel and volunteers that they could build on.

"The fact that SCOPE said they would come on board was incredible... It gave us a lift."

“We were a bunch of Johnny-on-the-spots... but SCOPE helped us feel like we were a bona fide Trust.”

“People don’t see us as groups of passionate amateurs any more, they see us as a highly professional organisation and as leaders in our field in Australasia. So our funding applications are more compelling, because we know ourselves and can show what we’ve achieved, so we’re getting the funding that we need and we’re lobbying more effectively for services.”

“We knew that we had some very experienced people, but we’d been too shy to promote ourselves. Now we profile them shamelessly...”

ORGANISATIONAL PROFILE

It was apparent that several organisations had increased their public and sector profile as a result of improved branding, marketing, networking or other communications (e.g. newsletters, conference presentations), as well as through increased referrals and delivery of increased or improved services. Two organisations commented that they had been invited to represent their sectors on advisory committees. One felt that their improved profile had been a direct contributor to increased income.

“The networking they opened us up to was tremendous... [Advisor] linked us up with the right people in [government agency] which helped us with our [funded] programme application.”

To what extent have the gains been sustained?

Table 1 shows that the large majority of survey respondents believed that the gains from SCOPE support had been sustained, and that they continued to benefit from those gains and also continued to build on them. Respondents variously described their organisations undertaking additional work since SCOPE to build capabilities, including training and mentoring, and some had sought and obtained additional funding to hire expertise for that purpose.

However it needs to be noted again that there may have been a sample bias in survey respondents towards those who benefited most from SCOPE support. For example, questionnaires were not completed by at least four organisations that had ceased to exist, and the case study organisations who reported little or no gain from SCOPE both noted that they would not have completed the survey.

Summary

In summary, more than half of the organisations supported by SCOPE experienced substantial capacity and capability gains from the SCOPE support in a range of areas, and many identified ways in which those gains had contributed to improved quantity and/or quality of services to clients or communities. Most of those organisations believed that those gains have been sustained to the present, and in many cases built on.

3. Did SCOPE support contribute to improved services to clients and communities?

A majority of respondents were able to attribute improvements in service delivery to SCOPE support. Survey respondents' agreement ratings averaged 4.0⁷ on the item 'Improved the quality and effectiveness of its services to the community', and six respondents (29%) spontaneously identified service improvements as one of the most significant changes attributable to SCOPE support.

Increases in services

Even though only one respondent spontaneously identified increased funding or personnel capacity as significant changes, in fact seven organisations (33%) increased their annual incomes by at least \$50,000 from 2006/7 to 2007/8, and seven (33%) increased their paid workforce (full-time and part-time staff) in the same period. Across respondents, organisations described increases in services in the range of 25% to 300%. In addition, 10 organisations (48%) had increased their volunteer workforce. Each of these gains can reasonably be seen as an indicator of significant increases in services.

"The number of clients we have seen in the last year has virtually tripled... The appointment of the 'right' Director has [brought] fresh vision and this has expanded our horizons as well as added to what we do."

"Our contact numbers [inquiries] have almost doubled in two years, and though we can't provide services to all of those people, we have the numbers to ask for increased funding based on demand."

"Increased size of quarterly magazine to current 36 pages, and now post regularly to medical practices."

In contrast, six organisations had decreased their workforce from 2006/7 to 2007/8, although it is not known whether this was a negative or positive impact (e.g. rationalising jobs).

Quality improvements to services

Service quality improvements described by survey and case study respondents included the following:

- Services becoming more client-focused (e.g. service transparency; internal monitoring and evaluation of service delivery; more empowering approach to service delivery) (48%)
- Better service delivery because of increased staff numbers, including volunteers (43%)
- Improved service accessibility to clients, resulting in greater contact numbers (38%)
- Increased service availability due to expansion or streamlining (29%)
- Safer client environment due to a better client focus (24%).

⁷ Rating scale **5 = strongly agree** and **1 = strongly disagree** with the questionnaire statement.

Several organisations, including some serving communities rather than ‘clients’ (e.g. arts and conservation organisations), noted that they had undertaken a greater number and diversity of projects or activities per annum than in the years before SCOPE support. Some organisations also reported a greater diversity of clients in terms of demographic.

Some organisations were also able to identify improved client outcomes from formal monitoring and evaluation.

“We’ve had a 5% increase in families seen this year and there’s still three months to year end... Client outcomes are being tracked and we are seeing better engagement, enjoyment and improved levels in goals, confidence and learning for our clients.”

“Successfully accepted by Charities Commission and tax exemption means cheaper costs for our [arts] events.”

“Our continual efforts to move the organisation forward have led us to evaluate current centres, close those that were no longer vibrant and viable, while opening others in places we were not already covering.”

Summary

In summary, a majority of organisations believed that SCOPE support had contributed directly or indirectly to improved and/or increased services.

“Our members directly benefit from continuity of services [disability support] offered to them free as a result of stabilising working capital arising from successful diversification of income streams.”

4. SCOPE strengths and success factors

The features of SCOPE that respondents found most valuable to them were aspects of the model and reviewer/advisor attributes and/or approach, in particular:

- Tailored intervention
- The focus on capacity-building
- Bringing the organisation's personnel together to review and plan
- A good 'fit' between the organisation's personnel and the advisors
- Being provided with planning and problem-solving processes
- The mentoring component of the consultancies
- Becoming linked into NGO networks.

"We'd pretty much been making it up as we went along before... We came out enabled – new skills, new knowledge, new processes, and feeling like we really knew what we were doing for the first time."

Tailored intervention

The aspect of SCOPE appreciated most was that the consultancy was tailored to the individual organisation. This meant that organisations acquired immediately useful knowledge and skills quickly and with relevance to their particular context. Where advisors attempted to deliver a 'package' approach to building organisational capacity that did not sufficiently reflect what the organisation had identified as its priorities, organisations were often left with their immediate needs unmet. Many organisations identified the organisational review stage as especially valuable because it either validated their current direction and planning or identified key problems that needed to be resolved so that they could move forward.

"We were all greenhorns, but SCOPE told us what we were doing is good... that we were on track."

Capacity-building approach

The adoption of a capacity-building approach was seen as invaluable because it resulted in sustainable gains to the organisations in terms of gaining new and valuable skills and knowledge, together with greater confidence in their ability to drive their own development.

Whole-of-organisation participation

The value of involving everyone in the organisation in the SCOPE support was in ensuring that (1) the advisor had full information, not just the perspectives of a minority, (2) decisions that needed to be made as a result of the advisors' work were made by the whole organisation, and (3) more than one person in the organisation was upskilled.

'Fit' between the advisor/s and the organisation

Where there was a good rapport between the members of the organisation and the advisor/s, trust and confidence in the advisor was greater and resulted in both strong organisational commitment to the work required of them and more immediately useful outcomes.

Focus on planning and problem-solving processes

The focus on teaching the organisations robust processes for strategic planning and/or for identifying issues and resolving them effectively resulted in organisations:

- Learning the value of long-term planning and how to do it
- Gaining skills in risk assessment and risk management
- Acquiring constructive processes for problem-solving and conflict resolution.

Mentoring

Several people commented on the value of receiving mentoring, as distinct from more structured training or consultant work. Using a mentoring approach allowed the development to be more genuinely 'client-driven', and resulted in key people – managers and chairs – taking more responsibility for problem-solving the organisation's needs.

Focus on networking the organisations

Several organisations commented that they had valued the way in which the advisors had connected them to other providers and umbrella organisations in both the NFP sectors and their industry area. These connections gave organisations a new and valuable relativity on their own work and development, as well as connecting them to often free and sustainable resources through those networks.

Summary

The most important and useful aspects of SCOPE support appeared to be the ability of the reviewers and advisors to work in ways that the organisations experienced as supportive and felt were focused on their identified needs, at that time that the help was needed, in their preferred style of operating, and that had provided real learning for them.

5. Suggested programme improvements

The issues in SCOPE implementation identified by respondents were focused mainly on having a limited choice of advisor, discontinuities in the transition from reviewer to advisor/s, the lack of quality monitoring of the consultancy, and an apparent tendency for some advisors to not adhere to the consultancy goals agreed to in the organisational reviews. Respondents thought that these issues could be addressed by incorporating a monitoring process within the consultancy, having a stronger structure to the reviewer-advisor transition process, and building a follow-up component into the consultancy model.

6. Conclusions

Sustained benefits from SCOPE

The data from this follow-up evaluation indicate that the majority of evaluation respondents believed that they had gained major benefits from SCOPE support in a range of areas, in particular improvements in:

- Organisations' systems
- Management and governance
- Strategic planning
- Internal relationships
- Ability of organisations to identify and address problems
- Financial management and accountability.

The majority of respondents felt that their capacity and capability gains through SCOPE support had been sustained and built on. An enduring benefit for many organisations was acquiring a philosophy of service review and learning for continuous quality improvement.

Improved services to communities

Most respondents were also able to show evidence that their capacity gains and changes to organisational practice had resulted, directly or indirectly, in significantly increased and/or improved services to clients and communities. In some instances these improvements were very substantial, including significantly increased funding, increased professional staffing, and significantly improved quality of service delivery. Areas where services had improved included becoming more driven by community needs, being more easily accessed by clients and communities, and becoming better tailored to community preferences. Organisations were more likely to be monitoring and/or evaluating their service delivery for quality improvement.

Improvements to SCOPE

While the majority of evaluation respondents were largely satisfied with SCOPE's delivery, several identified concerns. (The extent of dissatisfaction with SCOPE is unable to be measured accurately due to possible survey response bias towards respondents with positive experiences.) The main issues were around a lack of continuity from the SCOPE reviewer to advisors, together with some perceived failure of some advisors to deliver the particular help that organisations had sought and that had been identified in the organisational review as appropriate. Suggestions for improvement were focused on a better advisor allocation process, a better transition process from reviewer to advisor/s, and improved processes for monitoring the quality of advisors' work with organisations.

Value of the SCOPE model

The evaluation findings show that the SCOPE model has been effective in building capability and capacity for at least half of the participating organisations, including both new and well established organisations. For the organisations that responded to the survey, the gains had been incremental, and had given them not only the skills but also the

confidence to consolidate and in some cases expand their services to clients and communities. Many respondents expressed strong gratitude to SCOPE for support that had been a turning point in their organisation's sustainability.

Appendix 1: Interview guide

INTRODUCTION

- Greeting and appreciation
- Explain purposes of the evaluation and the interview
- Confidentiality
- Intended uses of data
- Interview recording process
- Timing of reporting

IMPACTS OF SCOPE SUPPORT

- What were the immediate impacts of SCOPE consultant support for the organisation?

Probe:

- ◊ Organisational capacity and capabilities/skills – *main focus on this*
- ◊ Clarity about purpose and direction
- ◊ Problem identification and management
- ◊ Improvements to relationships
- ◊ Greater accountability
- ◊ Morale
- ◊ Confidence
- ◊ Professionalism
- ◊ Other?

- What were the longer-term or later developments as a result of those changes?

Probe:

- ◊ Stability
- ◊ Changes to organisational structure/s
- ◊ Improvements to policy or systems
- ◊ Improvements to management or governance
- ◊ Funding and fund-raising
- ◊ Financial management
- ◊ Relationships and teamwork
- ◊ Reputation
- ◊ Further capacity-building
- ◊ Other?

- What was the *most significant change* for your organisation as a result of the SCOPE consultants' work with you?
- What were the *best things* that you got out of SCOPE support?
- What was the *most useful* aspect of the consultant's work?
- Were there any negative impacts?
- Do you think that the organisation has built on the SCOPE gains? If so, in what ways?

SERVICE OUTCOMES

- Have there been any evident improvements to the ways in which you are delivering services to the community? (*Detail*)
- Have there been any evident benefits to your clients or to the community? (*Detail*)
- Check for quantifiable service improvements (e.g. more staff; gains in staff qualifications; more clients; change in client demographic; more funding; any internal or independent service evaluation material that demonstrates increased or improved outcomes for the organisation, clients or community)

RECOMMENDATIONS FOR SCOPE ENHANCEMENT

- What might the consultant/s have done better, or more appropriately to your organisation?
- Do you have any other suggestions for ways in which the SCOPE consultancy process could be improved?
- At this stage, what are the organisation's main needs?
- Any other comments?

Appendix 2: Questionnaire



Follow-up outcomes evaluation of the SCOPE Capacity Building Programme

About the questionnaire

The purpose of this survey is to obtain feedback from organisations that were supported by SCOPE in 2006-2007 about the longer-term gains from SCOPE support. Please note that the questionnaire is anonymous. This information will be used in planning for future capacity-building support for not-for-profit organisations. *Many thanks for your help with the evaluation.*

Please read these instructions.

1. This questionnaire is in two parts.

Parts A and B – In the first two sections you will be asked to rate the outcomes of SCOPE support for your organisation on a number of factors. There is also space for you to write comments.

Part C – In the third section you are asked to provide some details about your organisation, so that we can understand any differences in the effectiveness of SCOPE support across different types of organisations.

2. So that the answers from your organisation are representative of a range of people in the organisation, we recommend that, if possible, at least 2-3 people representing a range of viewpoints (e.g. management, staff, trustees) have input into your responses.
3. Once you have completed the questionnaire, and checked that you have answered all questions, please return it in the stamped envelope provided, **by 30 March 2009**.

If you have any queries about the evaluation or how to answer the questionnaire, please contact the Evaluation Manager, Pam Oliver, on 3727749 or pamo@clear.net.nz

A. Gains from the SCOPE programme

Please answer the following questions as honestly and accurately as possible. Your answers are anonymous.

Looking back on the ways in which your organisation has changed as a direct or indirect result of support from SCOPE, please rate how much the gains listed below have occurred for your organisation. Circle *one* number only for each statement. Please rate *all* statements.

Use a scale from 5 to 1, where **5 = Greatly**, and **1 = Not at all**.

Because of SCOPE support, our organisation...	Greatly					Not at all	
1. Has become clearer about the organisation's purposes and direction	5	4	3	2	1		N/A
2. Has become better at identifying problems and acting appropriately to resolve them	5	4	3	2	1		N/A
3. Has improved relationships within the organisation (e.g. amongst governance, management and delivery personnel)	5	4	3	2	1		N/A
4. Has developed better organisational systems	5	4	3	2	1		N/A
5. Has more effective governance and/or management	5	4	3	2	1		N/A
6. Has improved its ability to deliver a service based on the organisation's intended purpose	5	4	3	2	1		N/A
7. Has improved the quality and effectiveness of its services to the community	5	4	3	2	1		N/A
8. Has developed the capability to build on the gains achieved through SCOPE support	5	4	3	2	1		N/A
9. Has become more stable (for example, in terms of financial management, funding and/or personnel)	5	4	3	2	1		N/A
Since the SCOPE support, our organisation...	Greatly					Not at all	
10. Has maintained the gains achieved through SCOPE support	5	4	3	2	1		N/A
11. Has continued to grow and thrive	5	4	3	2	1		N/A

Any comments??

A. Gains from the SCOPE programme (cont)

12. What have been *the most significant changes in your organisation* as a result of support from SCOPE? Describe up to 3 changes or impacts.

<input type="checkbox"/>	_____

13. *Which aspects of the SCOPE support* had the greatest impact/s for your organisation? List up to 3 factors.

<input type="checkbox"/>	_____

B. Community benefits

14. Are there any ways in which the support provided to you by SCOPE could have been more effective for your organisation? List up to 3 areas.

15. Are you able to identify particular benefits for your clients or community that might be attributed, directly or indirectly, to ways your service has improved as a result of the SCOPE support. Describe up to 3 examples.

C. Your organisation

Please tick **one** box for each question 15-20.

16. In which sector does your organisation mainly provide services?

- Health and social services
 - Sport and recreation
 - Arts and culture
 - Environment
 - Other (specify) _____
-

17. Does your organisation provide services primarily to...

- Māori
- Pacific peoples
- Asian peoples
- People of any culture

18. What was your organisation's annual income for 2006-2007 from all sources?

- Less than \$100,000
- \$100,000 to \$150,000
- \$150,000 to \$250,000
- More than \$250,000
- More than \$350,000

19. What was your organisation's annual income for 2007-2008 from all sources?

- Less than \$100,000
- \$100,000 to \$150,000
- \$150,000 to \$250,000
- More than \$250,000
- More than \$350,000

20. How many workers did your organisation have in 2006-2007?

- Full-time
- Part-time or casual
- Volunteer workers
- Unwaged board or committee members

21. How many workers does your organisation have now?

- Full-time paid
- Part-time or casual paid
- Volunteer workers
- Unwaged board or committee members

D. Completing the questionnaire

Please...

- Check that you have answered all the questions
- Tick this box if you wish to enter the prize draws for \$100 of book or petrol vouchers
- Tick this box if you wish to receive a summary of the evaluation findings

Write your name and contact details in the space below if you have ticked any of the boxes above. This page will be removed from the rest of the questionnaire.

- Name: _____
- Address: _____

- Phone number (day): _____
- Email: _____

Your personal details will remain confidential to the evaluation team and we will only use these details to contact you if you win the prize draw, or to send you the summary evaluation report.

Once you have completed the questionnaire, please return it in the enclosed envelope to:

Pam Oliver
1 Newton Road
Little Oneroa
Waiheke Island 1081

Many thanks for your contribution.

Appendix 4: Survey respondent demographics

Organisational profiles

	N=	%
Sector in which organisation mainly provides services		
Health and social services	16	76
Sport and recreation	1	5
Arts and culture	6	29
Environment	6	29
Other (Education, Special Needs, Community)	3	14
Ethnic groups services are primarily provided to		
Maori	1	5
Pacific peoples	3	14
Asian peoples	1	5
People of any culture	16	76
Base	21	100

	2006-2007		2007-2008	
	N=	%	N=	%
Annual income from all sources				
Less than \$100,000	7	33	5	
\$100,000 to \$150,000	3	14	2	
\$150,000 to \$250,000	4	19	5	
More than \$250,000	3	14	4	
More than \$350,000	4	19	5	
Base	21	100	21	100

	2006-2007		2007-2008	
	N=	%	N=	%
Types of worker				
Full time	14	67	15	71
Part time or casual	16	76	18	86
Volunteers	15	71	16	76
Unwaged board or committee	15	71	16	76
Base	21	100	21	100

