**How good is our third sector organisation? - Video transcript for Lead Scotland**

Lead Scotland is a national voluntary organisation set up to widen access to learning for disabled people and carers in Scotland.

This video describes Lead Scotland's approach to piloting the 'How good is our third sector organisation?' (HGIOTSO) self-evaluation framework and what they learned from this experience.

**Transcript**

My name's Emma Whitelock. I work for LEAD Scotland - Linking Education and Disability. I'm the Learning and Business Development Manager. LEAD widens access to learning for disabled people and carers across Scotland.

We got involved in the pilot because we already use a number of self-evaluation based resources and we wanted to explore whether this could be something else we could use in our tool kit. We use PQASSO, Investing in Volunteers, 'How good is our community learning and development?' to 'Explaining the Difference', for example, and we just wondered - just wanting to have a good fit with third sector and the overarching framework, so we thought it might be pragmatic to get to know it better and also to try and influence this new resource.

What we did was we initially set up a steering group which was really representative of a number of stakeholders within LEAD Scotland. So we had a volunteer, a board member, manager, the executive director, frontline staff etc, and we decided that we would sort of monthly meet up, face-to-face and also have remote meetings as well because obviously it costs a lot of money to get people together face-to-face.

So that's how we did it. Then we thought, 'How are we going to start?' So finding that starting point was something we took a bit of time to really unpack for ourselves. We kind of felt that the starting point might be to agree on a common understanding of what self-evaluation was all about, so we kind of worked on this as different people coming from different perspectives; had different interpretations of what self-evaluation was and we wanted to unpack that it wasn't just about looking inwards.

One way we found our starting point was to use the six-point scale. Everybody read the whole resource and then used the six-point scale to score against each of the indicators to then - so then we sat down and we looked at that. We did it anonymously and we sat down and we looked at the results. That gave us a flavour of how people saw the organisation and it also helped us to find a sort of starting point for prioritising indicators.

As a group another way we looked forward to try and get a starting point was to look at our HMI and also our PQASSO findings. Really, we wanted to see whether or not we'd improved some of the areas that had sort of scored less well. So we wanted to look at those first to see whether we had in fact had improved since that time.

What we mostly did at the group meetings was use the challenge questions to really stimulate discussions, because that really helped us identify gaps, identify areas for improvement and then really think about how are we going to implement these and put them into action, and then reflect on whether we actually, this had led to improvement.

Why we got involved in the pilot was really to see whether or not we could get a result using this tool. Could we actually use it to lead to improvement? What we found was that using the challenge questions was really the main kind of driver for us, then creating actions which we could sort of implement.

We, as a result, got new recording tools. We created new staff and volunteer surveys. So we found it actually did help us to actually turn things into action. So we found it really useful that way.

We also felt it was really important that, as an organisation working with disabled people and carers, we wanted to make sure that we can try and influence the language to help promote inclusion as that's something that's really important to us.

It was really quite easy to use. It was clear, accessible language and all the stakeholders could engage with it, so it created a level playing field for everybody to get involved.

We also thought it was really something we could use in whole or in part, and that means you could pick and choose bits as well, which is really useful and you can't do that with all the tools. Often we take a really methodical approach to self-evaluation, but we found we could actually do it quite organically with this resource and that was quite useful too. It sounds flippant to say playful, but it means that we could pick and choose bits and pieces and use it for smaller pieces of work as well.

One example is we had a strategic planning day and so we're trying to embed a culture of self-evaluation, so what we did was we looked to the resource and then created a day where we looked inwards and outwards and created a document which sort of brought a lot of data together which looked inwards and outwards. We asked people to digest this and then on the day we looked forwards and this was really useful because it meant that the whole staff and board team really acknowledge that self-evaluation was about looking inwards, outward, and forwards. Then that led to SWOT analysis.

This is going to give us a more sort of evidence-based, focused way of engaging with the strategic planning process.

So the challenge questions really set us on a path there.

The resource has a no-nonsense introduction. So you get straight into it and it tells you quite quickly why you would want to use and how you want to use it. So that was really helpful as well. One of the benefits is that we've got another resource that we can use and we can use it in whole or in part to basically help us self-evaluate better for improvement, and anybody in the organisation can pick it up, which is really helpful.

Another benefit is it's a very non-threatening approach to self-evaluation. It's very easy to use, it's accessible and we were very clear within the parameter of the group that we weren't going to use this for appraisal purposes. This is just to enable people to step back and ask so what questions and be supportive in trying to move forwards.

I see the benefits for using this resource within the wider sector, as it develops organisational confidence using self-evaluation for improvement. It creates a common language, shared understanding, and it will be something that's really supportive of partners seeking to self-evaluate together. It creates a level playing field and the resource is, it speaks to the third sector and to the overarching framework and it really connects the two, so that will be really helpful going forward.

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