

Hosted by The RS MacDonald Trust on the 26th May, this is the 3rd in our series of masterclasses focusing on tricky topics that are common to many funders. **Adding up outcomes** was the subject, sometimes called aggregation or meta-analysis, we explored different methods and approaches to making sense of outcomes and evidence received from grant-holders across a spectrum of funding practice and programmes.

Funders attended from: Foundation Scotland, The Robertson Trust, Historic Scotland, Keep Scotland Beautiful, Creative Scotland, The Voluntary Action Fund, RS MacDonald, LEADER programme, and the Scottish Universities Insight Institute. Participants talked together about their current evaluation practice and spoke about barriers that include: lack of time and capacity, variation in size and length of grants, accountability to others (e.g. Scottish Government or private investors) and some funders that don't ask for outcomes.

We posed the question: **who needs to know about the difference your funding makes and why?** Answers included: our **grant-holders** so they know we use their evidence to provide feedback and how it contributes to the bigger picture, our **Trustees** so they know the money has been well spent, the **funding team** so we learn and develop from what we find out, **Scottish Government** so they understand the contribution of the third sector, and the **general public** to raise awareness and showcase good work.

The workshop was based around challenges identified at a funder seminar we hosted on the subject of Funders Measuring their own Impact back in 2012. Delegates were given a workbook enabling them to score themselves against each challenge. This was adapted from the [Evaluation Declaration Health Check](#), a resource we created in partnership with The Scotland Funders' Forum.



Challenge 1: What are we measuring?

It makes it easier to measure difference made if you have a clear set of criteria for funding. Knowing what difference you want to make and being curious about whether this is happening will help you decide how you get the information you need.

What are your evaluation questions? This depends on what kind of funder you are – grant size, capacity, single-issue, themed, accountable to others or completely independent.

A blue speech bubble containing the text: *Could we be clearer about what outcomes we want our funding to achieve?*

Evaluation questions

1. Who needs to know about the difference our funding makes and why?
2. Are we funding to achieve particular aims and if so what are they?
3. What level of information do we require – what's good enough?



Challenge 2: How do we create circumstances that encourages good reporting?

In 2009 ESS facilitated a sub-group of the Scotland Funders' Forum to create [Harmonising Reporting](#), a report identifying how to make reporting more meaningful and less burdensome for charities and funders.

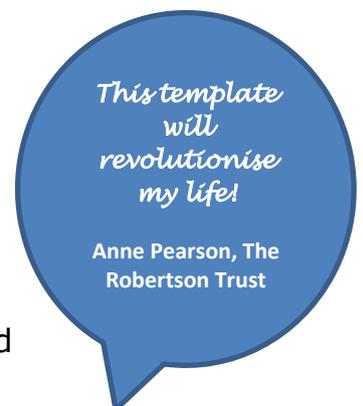
Key points:

- Relationships matter – be friendly and encourage honesty
- Have flexible forms with clear guidance
- Align where possible with other funders – share a report?
- Minimise jargon and explain language if necessary
- Provide evaluation support and guidance



Challenge 3: How do we extract evidence from our reports?

Having an agreed template can make life a lot easier for staff tasked with assessing reports. Delegates were given an ESS example template, plus an adapted simpler version created by The Laidlaw Trust. They also looked at the Voluntary Action Fund's assessment template for their Violence Against Women Fund that was co-designed with ESS in line with their aggregated fund outcomes.



Challenge 4: How do we evaluate across different programmes of small and large grants?

Using ESS' report: [How Funders in Scotland Measure their own Impact](#) written by Steven Marwick, we broke this challenge into 4 areas:

Simple approaches

Most appropriate for small grants (under £10K) and funders with limited capacity. Questions might simply be:

- How was the grant spent?
- How many benefitted?
- What sort of differences were made?

You can read more about evaluating small grants from our first masterclass [Small and Simple](#).

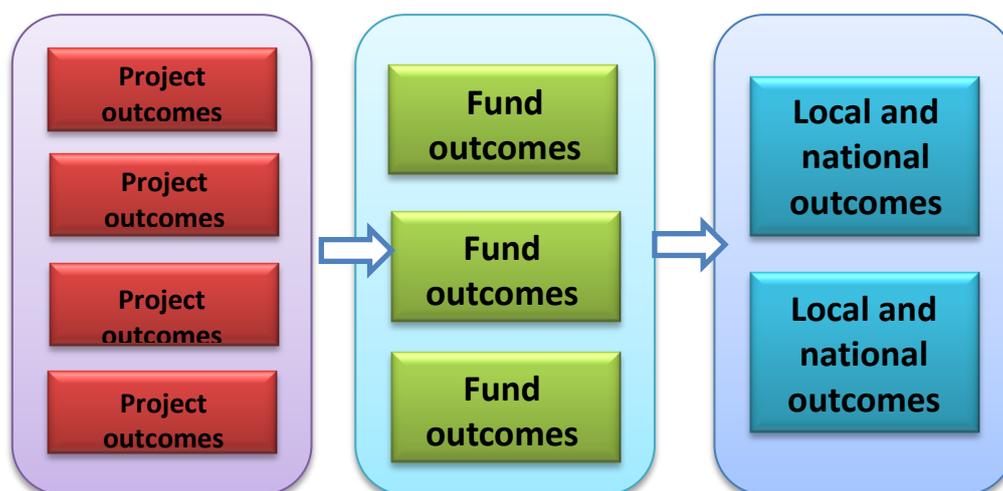
*Really useful
and practical
ideas and good
to compare with
other
organisations*
Nicola Allan, Scottish
University

Funder-led approaches

Appropriate for those with specific fund outcomes, co-funded programmes where joint outcomes are agreed at the outset, or for those who manage funds on other's behalf e.g. for Scottish Government. This approach:

- The funder has a high level set of outcomes that organisations can 'map' their own outcomes to
- Allows the funder to report on intended outcomes (e.g. 20% of funding increased young people's confidence)
- Allows the funder to code reports on a simple scale of how well they've reported on outcomes – say a star rating system
- That allows them to say, for example 80% of funded projects showed good or excellent impact against planned outcomes.

Project outcomes map to fund outcomes map to local and national outcomes



We were joined in the afternoon by Elaine Wilson from the Partnership Drugs Initiative who has been working on their evaluation systems for over a decade. Elaine shared their journey to adding up outcomes that included an assessment template, post assessment visit form and their logic model.

Elaine stressed the importance of clear expectations at the outset.

Co-design

This is when both the funder and funded work together to agree an evaluation and reporting approach. Benefits include:

- A common approach is created but does not feel imposed
- The framework can be used not just for evaluation but also for explaining what this area of work is about E.g. dementia, families affected by imprisonment
- The framework provides a ready-made approach with which to explain, measure and prove impact.

At ESS we facilitate a number of structured programmes working with funders and Scottish Government to skill up third sector organisations in a particular policy area. Programmes usually involve a learning set that explores the evidence across their sector and often results in evaluation toolkits and evaluation and reporting approaches. Find out more about our thematic learning programmes [here](#).

How did they score?

The delegates scored themselves against the different challenges to work out where they needed to focus on with their colleagues.

Find out how well you score [here](#).



Stuff to remember!

- Be clear about your funding outcomes
- What do you want to achieve by knowing your impact
- Who are the potential audiences
- Encourage and receive outcome reporting
- Think about how to encourage funded organisations to focus on outcomes
- Think about what you might stop doing to free up time (for example shifting emphasis from detailed financial reporting)
- Create a framework that enables project outcomes to map to your fund outcomes
- Put in place a system for assessing funded organisations reports
- Give feedback to organisations on their reports so they get better over time
- Consider getting feedback on your own performance as a funder!