

“There are simple steps we can take to involve funded groups in evaluation that can potentially have big impact”

On the 1st September we held the 4th funders’ masterclass **Evaluating Together**. We had a helpful mix of funders with a broad spectrum of grant-giving as well as those funding a specific theme.

There is an increasing emphasis on the value of participation and collaboration in the third sector. Evaluation in partnership is no exception and, done well, can result in improved practice for all parties, better quality of evidence and more effective reporting.

We started the session by asking:

Why do you think it’s important to evaluate together?

- *To reflect and improve practice*
- *Better accountability for both funder and funded*
- *To improve our communication with all stakeholders*
- *To get the ‘real’ story*
- *For improved relationships*
- *Funded projects more motivated by funder’s genuine interest*

What makes it difficult?

- *Different funders, different demands*
- *Time and capacity for both funder and funded*
- *Actually doing something with the learning*
- *Getting that honest information*

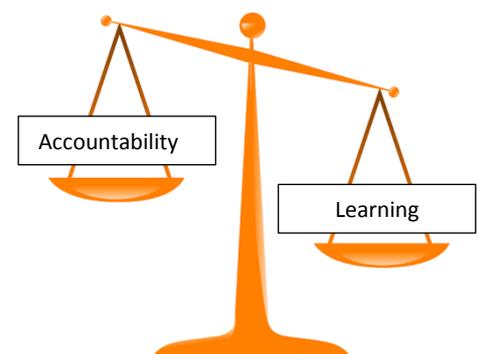
What do you want to get better at?

- *Build relationships*
- *Make more time to reflect*
- *Use the learning to improve our practice*
- *Ask for what we want!*
- *Get the balance and proportionality right*

So you’ve decided to evaluate together with your funded projects. Some points to consider before you get started:

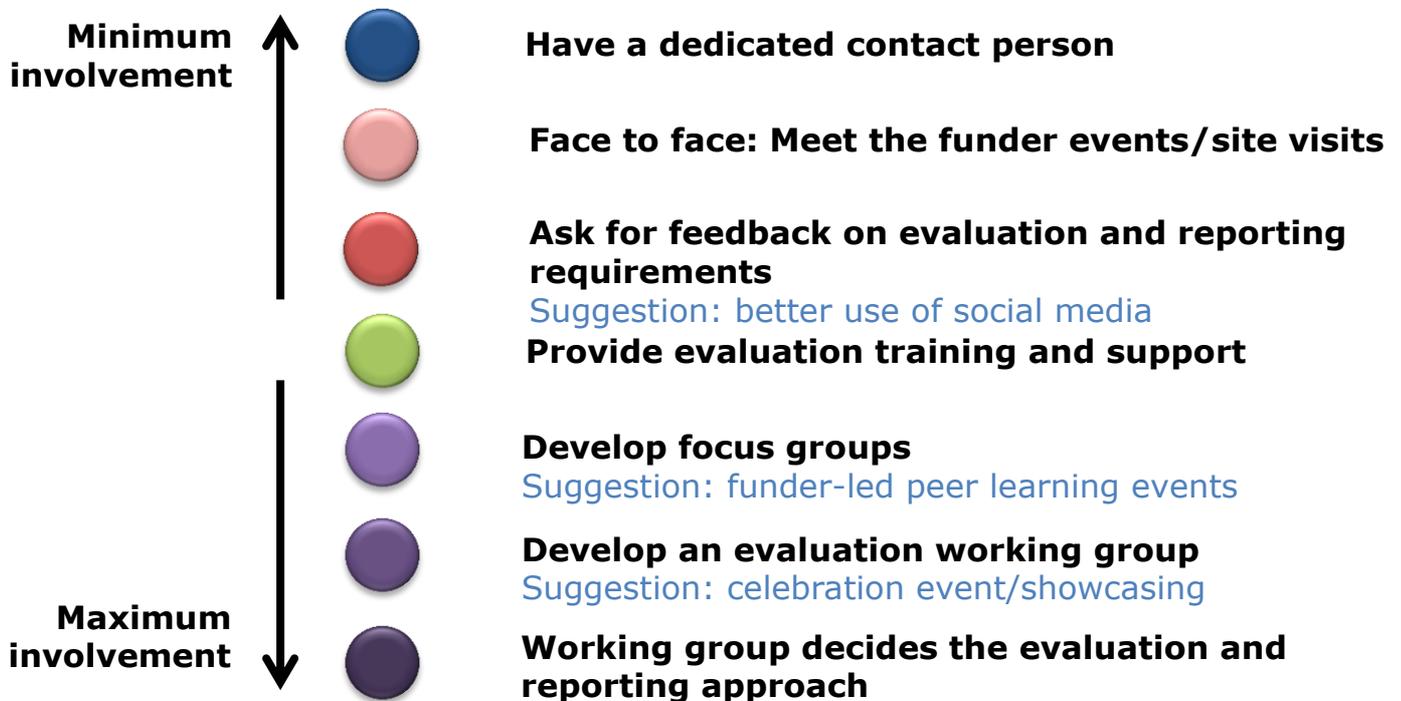
- Are we clear why are we doing this?
- What’s our capacity to involve?
- What’s the capacity of funded projects to be involved?
- Do we want to learn about something in particular?
- Do we want to involve all funded projects regardless of size and length of grant?
- Do we want to share our learning and influence others

Our experience at ESS is that funders want funded project’s self-evaluation to be about learning and not just accountability for money spent. All present agreed that this was true for them and that involvement was about good relationships and honest communication.



Using the ESS resource [Why Bother Involving People in Evaluation](#) as reference, the group reviewed a spectrum of involvement adapted for funders. Some funders found it more relevant than others and we added in suggestions that had surfaced throughout the day.

There is a range of different degrees to which funders might involve projects they fund in their evaluation and reporting approaches:



Start of the spectrum: examples from masterclass participants

The Climate Challenge Fund gave an example of taking senior staff and trustees out on a bus to tour funded projects. This was very powerful and helped trustees to have a deeper understanding of key issues and make better informed funding decisions.

BIG Lottery was invited to a community event that showcased projects and activities they had funded. It was a huge success with lots of learning for them as a funder.

Effort and impact
Maximum involvement doesn't necessarily mean maximum effort

Not too much effort: What have other funders done?

- SCVO provided a ½ day workshop to help projects with a new, small Scottish Government fund to identify simple outcomes and agree how they wanted to report back.

Benefit to SG: common programme outcomes easily aggregated and better reporting
Benefit to projects: clarity of purpose and more meaningful reporting

- The Voluntary Action Fund added 2 extra questions at the bottom of a report template:
 - How well did we support you?
 - How was it filling in this form?

Benefit to VAF: opportunity to improve practice and build trust
Benefit to projects: opportunity to have their say and shape reporting approach

A bit more effort: What have other funders done?

- Lloyds TSB Foundation offer external evaluation training and support to those they identify as most in need.
Benefit to Lloyds TSB Foundation: Shared understanding of evaluation language and approaches and improved quality of evidence and reporting
Benefit to projects: Increased skills and confidence and better chance of securing funding elsewhere.
- A group of seven projects funded by the ALLIANCE Self-Management IMPACT Fund came together with fund staff to explore and share experiences of how funders and funded projects can build mutually beneficial relationships. The group met three times.
Benefit to funder: Opportunity to improve their practice, better buy-in from projects and therefore better evidence
Benefit to projects: A better relationship with their funder, influence over the funder's practice, a top tips guide that will help the wider network

You can read more about Top Tips for Funders [here](#) and Top Tips for Funded [here](#).

Even more effort: What have other funders done?

- The Climate Challenge Fund deliver their own evaluation support programme. In this case, the funding is for a particular theme; specialist advice and guidance is given in relation to the policy area.
Benefit to funder: A consistency of evaluation and reporting practice and strong evidence base in a specific area
Benefit to projects: A trusting and honest relationship with their funder, increased skills and confidence, and a strong advocate for their work with decision-makers.
- An evaluation working group of projects funded through the [Violence Against Women Fund](#) co-designed a new report template with Voluntary Action Fund staff. The group also helped design the evaluation support programme and an event to consult with funded projects about how well they had been supported by their funder.
Benefit to funder: Authentic learning from grassroots, opportunity to improve their practice, greater influence over broader strategy and policy.
Benefit to projects: Improved evaluation skills, an honest relationship with their funder, a report that suits them, and an opportunity to influence policy and practice.

A blue speech bubble containing a quote in white cursive text.

“We need to celebrate more and talk to other funders when we’re setting up a grant”

What did participants take away with them?

Throughout the masterclass, the group were asked to reflect on and share their own practice in relation to efforts made to involve their funded projects. Each of them captured ideas and actions that they could take back and implement back with their funding organisation.

We transferred these actions into an effort/impact grid:

Low effort / High impact

- Add in 'how was it for you?' on reporting template
- Improve online support and guidance
- Give better feedback to groups – both positive and negative!
- More interactive use of social media – 'how are we doing' tweets
- Create a working group to review evaluation materials
- Evaluation training inc online for remote projects

High effort / High impact

- Influence policy-makers and leaders using project-led evaluation
- More cross-themed discussions and learning
- Have evaluation champions within organisations
- Shadowing opportunities for funding trustees to experience grassroots projects

Low effort / Low impact

- Turn induction workshop into a webinar
- Themed celebration and learning events
- Provide an evaluation 'testimonial' at the end of funding period to give to other funders

High effort / Low impact

- More one to one support for grantholders
- More evaluation support for funding team

The above represents actions that the funders present felt would be useful for their organisations.

Some key learning points from the day were:

Be clear about why you want to evaluate together - benefits to you, benefits to funded projects

Consider everyone's capacity. What is proportionate in terms of effort made to impact made?

If you're asking fundees what they think, you need to be prepared to act on what they say.

Suggestions for future masterclasses:

- Evaluation tracking from one funder to the next
- Using social media effectively as an evaluation method
- Evaluating with others e.g. statutory services and local authorities

If you have any ideas about what would be useful to you and your funding organisation please contact Emma on 0131 2432778 or emma@evaluationsupportscotland.org.uk

ESS would like to thank **The Robertson Trust** for their continuing support for our funder learning programme.