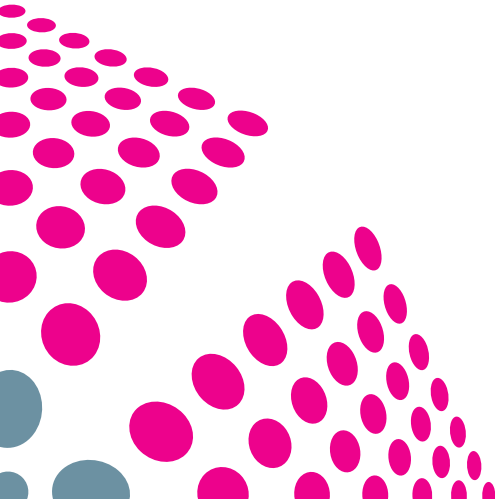




Scotland Funders'
Forum

The Evaluation Declaration 2006



About the declaration

This declaration is about the relationship between funders and the organisations they fund. It is about how and why we evaluate our work together.

There are five statements. The statements describe why monitoring, evaluation and reporting are important and what they should achieve.

For some funders and funded organisations this declaration describes their approach to monitoring, evaluation and reporting right now.

Others are moving towards the statements in the declaration but they are not there yet and challenges remain.

The declaration does not have an official status. But it is important.

The declaration is evidence of shared thinking between funders and a shared agenda with the organisations they fund. For the first time in Scotland funders have set out their view and vision of monitoring and evaluation. And they have done it together.

The declaration should help the voluntary sector and others understand what is important to funders in monitoring and evaluation and so improve relationships between funders and funded organisations. This declaration in turn will, in a small way, help ensure that our work is focussed on making a positive and vital difference for the people of Scotland.

December 2006



The Declaration

1. Evaluation is valuable

When an organisation or a funder undertakes evaluation they are finding out what they do, what difference they make and what can they learn as a result. Evaluation involves analysing, reflecting and learning. Evaluation is worth doing because it helps us understand the value of our work. It allows us to celebrate and understand success, and learn and improve for the future. Evaluation should include getting meaningful feedback from service users. So if we do it well evaluation can help people participate and feel included.

Funders and the organisations they fund are committed to evaluation because it adds value to their work. Funders want to use the results of evaluation not just to check what happened but also to help make informed decisions and plan for the future. Funders and the organisations they fund want monitoring, evaluation and reporting to help them better understand what works for whom in what circumstances and why. Learning needs to be shared between organisations and across programmes. And plans for this should be built in from the start. This in turn will help ensure policy and future funding programmes are relevant and effective.

2. Evaluation is relevant

Evaluation should be used, shared, and acted on. This happens best when evaluation is relevant and when it focuses on outcomes. Outcomes are the differences or changes that happen as a result of a service or activity. Funders want the organisations they fund to tell them about the difference or change that happened as a result of their project. Funded organisations want to focus on telling the story about that difference or change - not only counting attendance and activities.

Focussing on outcomes helps organisations know what they have achieved and why, and what they need to improve in the future. It helps ensure services and activities are delivered in the most effective way. Funders believe there should be a shift to reporting on outcomes. For some funders and funded organisations this is a challenge for the future and will not happen overnight. But we believe that focusing on outcomes is important. This means more relevant evaluation, less focus on reporting detailed activities and more reporting about the difference or change that happened - or did not - and why.



3. Evaluation is proportionate

Funders want to have a relationship of trust with funded organisations. Funders assume that the organisations they fund will work hard to deliver a successful piece of work, rather than that those organisations are bound to fail unless there is detailed scrutiny. Monitoring and evaluation requirements should therefore be proportionate and make sense. Evaluation plans should be right for the size and complexity of projects and add value even for the smallest projects.

Alongside trust goes accountability.

Funded organisations need to account for the funding they receive and funders require a certain amount of compliance reporting to ensure that the money is being spent correctly. Funded organisations also need to trust their funder and, for example, have the confidence to say when things are going wrong and why.

Funders need to account for the funding they distribute, and trustees, partners and politicians need information to show them that money is being invested properly. Funders also need to be accountable to the organisations they fund, for example by being as open as they can be about how they use evaluation reports.

There are barriers to building a climate of trust between funders and funded organisations. But it is already happening in many places and can be built on. The prize of developing a culture of trust is a better understanding between funders and funded organisations, better use of money and better learning about how best to meet the needs of the people of Scotland.

4. Evaluation is supported

Funders and funded organisations both take responsibility for supporting evaluation in Scotland, for making evaluation happen. Funded organisations can help by investing time in self-evaluation. They can build their own understanding of what they are doing and why. They can promote a culture of learning in their organisation. They can share results of their evaluation with peers. They can ensure evaluation is done ethically. Funders can help by clearly setting out why and how they think evaluation should happen. They can provide clear guidance to the organisations they fund. They can build capacity to evaluate in the organisations they fund or in organisations that support them. They can offer funding where it would help to make self or external evaluation happen.



5. Evaluation is about looking from inside and outside

Evaluation is about looking from inside. Self-evaluation happens when an organisation collects information about its activities and services and the outcomes that happen as a result. The organisation then analyses and reflects on that information and learns from it. Funders want the organisations they fund to self evaluate and to share what they learn.

Evaluation is also about looking from outside. Sometimes a funded organisation, funder or both will decide that an external evaluation is useful. External evaluation should add value to - not replace - an organisation's own self-evaluation and learning. And it needs careful planning and management. But it can be powerful to bring in other people's expertise to look at the activities and outcomes or to collect and analyse information.

The Scotland Funders' Forum

The Scotland Funders' Forum started in September 2005 and brings together statutory and independent funders to share information, identify and address areas of common interest and share best practice and learning. The Forum is an informal and non-constituted group. The Big Lottery Fund chairs and provides the secretariat for the Forum as a part of a commitment to support its development.

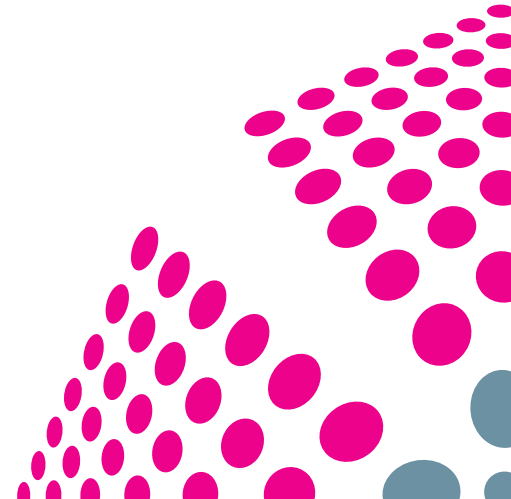
Membership reflects the diversity of funders in Scotland, focusing on those that have a base and a substantial history of funding in Scotland. The Forum looks widely at funding issues in Scotland but focuses particularly on funding of the voluntary and community sector. Attendance at the Forum is from senior staff members (usually Chief Executive). This gives the Forum weight and helps get things done.

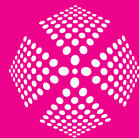
The Scotland Funders' Forum are: Scottish Executive, COSLA, Communities Scotland, Big Lottery Fund, Heritage Lottery Fund, sportscotland, Scottish Arts Council, Highlands and Islands Enterprise, Lloyds TSB Foundation for Scotland, BBC Children in Need, Laidlaw Youth Project, Robertson Trust, Voluntary Action Fund, Scottish Community Foundation, Carnegie UK Trust, Rank Foundation, Forward Scotland, Comic Relief, Social Investment Scotland, and SCVO.

This declaration has been drafted by the Scotland Funders Forum in partnership with Evaluation Support Scotland. Evaluation Support Scotland is a voluntary organisation that provides practical support to voluntary organisations and funders to help them evaluate and learn and so provide better services for communities. **For more information please see www.evaluationsupportscotland.org.uk.**



If you have any comments or questions on this
declaration please contact
Dharmendra Kanani
Scotland Funders' Forum Chair and Director for Scotland,
Big Lottery Fund
1 Atlantic Quay, 1 Robertson Street,
Glasgow, G2 8JB
Phone: 0141 242 1400.
Email: Dharmendra.Kanani@biglotteryfund.org.uk





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