

# Scotland Funders' Forum Evaluation Declaration

## Health Check Tool Guidance

### Purpose of the guidance

1. The Evaluation Declaration Health Check Tool was developed by Evaluation Support Scotland (ESS) for the Scotland Funders' Forum. It is now available for any funder to help them review their monitoring and evaluation systems. This guidance is to help you fill in the tool. The tool itself is a separate document.

### Purpose of the tool

2. The Scotland Funders' Forum is a group of public and independent funders who work together to try to make funding better. One part of that is monitoring and evaluation. In December 2006 the Forum published the **Evaluation Declaration** which sets out 5 statements that describe why evaluation, monitoring and reporting are important and what they should achieve. This tool is the next step to help funders work out to what extent the Declaration reflects reality.
3. Filling in Evaluation Declaration Health Check tool will help you think about the way you undertake monitoring and evaluation in your role as a funder and your relationship with funded organisations. It will help you identify what you do well and areas where you might do better.
4. Once you've filled in the tool you can send it to ESS who will draw up a personalised **evaluation health report** which says where you are now and sets out some actions you might take to improve your monitoring and evaluation practice – and in turn deliver better and more effective funding and increase understanding about what works.
5. **You are most likely to get something out of this process if you are honest about your organisation.** The things you do well will stand out if you are open about anything you do not do so well. You are not expected to be perfect!

## What this tool is not about

6. **There is no league table of funders.** You will not get a score or a grade. There will be no lists of 'good' and 'bad' funders. There is not a single 'right' way for a funder to undertake monitoring and evaluation. It depends on why you give out funding, how much you give, what resources you have, whether you need to report to someone else and so on. So what is right for another funder may not be right for you.
7. **There shouldn't be any surprises.** This tool follows the principles of self-evaluation. It will help you focus on what you probably already know about your monitoring and evaluation but perhaps you've not previously taken the time to think about systematically. ESS's health report will draw on their expertise and experience to reflect on what you've said in your completed tool. But there should be no major surprises
8. **This is not a public exercise.** Your answers are **confidential**.
9. This is **not** about your funding application or decision-making processes.

## What is evaluation?

10. This tool is about **how you find out what happens to your funding** after you've made a funding award.
11. The tool calls this whole process **monitoring and evaluation**.
12. Whenever the phrase monitoring and evaluation appears in the tool it means **your systems and processes for collecting information and analysing, reflecting and learning what has happened with your funding, what difference it has made and what you can learn as a result**.
13. But if it is hard for you to use this definition because you have a different way of thinking about monitoring and evaluation then don't worry! There is a box in **Section 2** of the tool to write the definition you work to. Then whenever the tool refers to monitoring and evaluation you should think about your definition.

## How to complete the tool

14. Some funders have several funding programmes and larger organisations may have different departments that each give out funding. It is best if you complete the tool in relation to **all the funding** your organisation gives out. This is because it will help you get a complete picture. It will

help you think about whether you do things in the same way across your organisation and if not why not.

15. But if it is too complicated to complete the tool about all the funding you give out then you should pick a particular funding programme to focus on and make that clear in **Section 1** of the tool.
16. You should try to ensure that the completed tool reflects the views and experiences of the people responsible for funding in your organisation. A good way to do this is to pull together a representative group of staff to work through the tool together. You should probably allow **3 hours** to go through the tool **plus** time to type your answers into the tool and, if necessary, circulate a draft to colleagues.
17. You are **not** expected to consult your funded organisations. You may have feedback already that you can draw on. And you may decide that consulting funded organisations is a potential action for the future.
18. Please do **not** send funded organisations this tool. It is not designed for funded organisations. It may raise false expectations or cause confusion.
19. ESS can help you complete the health check if you wish but you should be able to fill it in without help.

## The Evaluation Health Report

20. If you want you can send your completed health check to ESS who can put together an evaluation health report about you as a funder.
21. This will include a few manageable actions to take in future. The list of likely areas for action will be drawn from the following areas:
  - The support you provide for staff
  - What you say (or don't) about monitoring and evaluation internally
  - What you say (or don't) about monitoring and evaluation externally
  - The materials or forms you use for monitoring and evaluation
  - The role of different staff teams within larger funders
  - What support or guidance you provide for funded organisations (if any)
  - What you do with monitoring and evaluation information you receive
  - How you share learning with funded organisations or other funders
22. If you want a health report please send your completed tool to Steven Marwick  
Email: [steven@evaluationsupportscotland.org.uk](mailto:steven@evaluationsupportscotland.org.uk)  
Address: 5 Rose Street, Edinburgh EH2 2PR.  
Phone: 0131 243 2771

23. Please **also** send the **key material** that will give ESS more information about your monitoring and evaluation. This might include **monitoring forms, guidance for funded organisations or strategy documents**. Please use your discretion and just send the really important material so ESS is not overwhelmed! And please don't send application forms. If the key material is on your website then please tell ESS where they can find it.
24. If you have questions or concerns after reading this guidance or if you don't have a copy of the tool or the Evaluation Declaration please contact Steven at the above contact details.
25. The tool itself is free but ESS will charge for their time in preparing a health report.

### Other information

26. The main contact for the Scotland Funders Forum is the Big Lottery Fund 0141 242 1400. The Scotland Funders' Forum web page can be reached through [www.biglotteryfund.org.uk/scotland](http://www.biglotteryfund.org.uk/scotland). This includes a copy of the Evaluation Declaration.
27. ESS's website is: [www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk).
28. Further reading: 'Does your money make a difference?' by Charities Evaluation Services is a short guide that looks at best practice in monitoring and evaluation and sets out different models of good practice for different sizes of funder. It may be more directly relevant for Trusts and Foundations than for statutory bodies but it is useful for anyone with a funding responsibility. Please see [www.ces-vol.org.uk](http://www.ces-vol.org.uk).

This tool was prepared by Evaluation Support Scotland with funding from the Big Lottery Fund and the Scottish Government.

ESS is a registered company SC284843 and Scottish Charity SC036529