

## Texts from sessions of conference, 13 January 2010

### Welcome

From **Mary Craig, OBE** the convenor of the Board of Evaluation Support Scotland and Chief Executive of Lloyds TSB Foundation for Scotland.

Welcome to **Learning from Evaluation – fitting the pieces together**, the 2010 Evaluation Support Scotland conference. I'm Mary Craig, the convenor of the Board of ESS. If you're here, you probably already understand some of the role that evaluation can play in improving your work. Today we'll all have a chance to share ideas about how we can learn from evaluation. Hopefully by the end of the day we will all have had a chance to:

- Share ideas about how evaluation is helping us
- Share ideas about how we gather together what we learn from evaluation
- Find out about what ESS has been doing recently
- Network with other people interested in evaluation.

### Dramatic Monologues and Discussion

Introduced by Steven Marwick, Director, Evaluation Support Scotland

Good morning

What's the point of evaluation?

These were the words I used at the very start of the launch of Evaluation Support Scotland four years ago.

And indeed one of the reasons for having a conference today in the depths of winter is to celebrate the fourth anniversary of our launch. I wanted to call this conference 'Go Forth and evaluate!' but my colleagues felt that was a pun too far. Instead our anniversary present to ourselves is a jigsaw puzzle.

We spend much of our time helping organisations like yours set their outcomes, design their evaluation methods and write their reports that even we at Evaluation Support Scotland sometimes lose sight of the **point** of evaluation. But evaluation is not an end in itself. Evaluation needs to be about learning.

- To help us understand better how to meet needs and solve problems
- To help us make better use of resources
- To celebrate our successes

So today is about putting the evaluation pieces together and to work out what the picture tells us.

We are using the metaphor of a jigsaw because we recognise that jigsaws – like evaluation – can be a challenging puzzle to put together. You might not have all the pieces. Or you may struggle to put them all together easily. And even if you do, do we see the same picture?

Here's a picture you might have seen before.



Maybe you see a young girl. But if you are a manager like me and see problems everywhere, the picture is of an old witch. And if you're an academic you'll be asking for more research.



This picture is called 'where does the buck stop'. And in fact there are several bucks in this picture! Different sizes going in different directions. How many can you see?

So putting the evaluation pieces together is difficult. And we might not all see the same picture! Throughout today we'll hear how different people are wrestling with evaluation jigsaw challenge – and why it's worth meeting that challenge.

But first ...

Some of the different pieces in our evaluation jigsaw are different perspectives. Everyone here today has a different perspective on evaluation. You might be looking for different things from evaluation and you might use evaluation differently. But just how different are we and can we fit our perspectives together?

As you may know it is ESS's mission to put the fun into evaluation as often as we can! So let's travel to Scotland's 33<sup>rd</sup> local authority – McDeeshire.

And we're dropping in on the McDeeshire Family Centre – a thriving voluntary organisation. The centre provides a wide range of services for vulnerable people including an advice line, youth work, mother and babies groups and support for people with mental health concerns.

McDeeshire Family Centre is one of ESS's favourite organisations. They do good, straightforward evaluation. But what is the evaluation for and how is it used?

We're going to hear from 6 different people connected with the Family Centre to find out their perspectives on evaluation.

Just to be clear – this is made up! The people you see before you are highly skilled actors who we've recruited from Hollywood at vast expense. But the stories they will tell you are drawn from real life experience. Our aim is to start thinking about your perspective on evaluation and the different pieces in your evaluation jigsaw. Once you've heard the stories we'll have some time for you to talk to the people at your table about what you've heard. So listen carefully and let's meet the different people connected with the centre.

**Jacqui** the development worker

**Emma** the manager

**Kirsten** the council official

**Linda** the funder

**Juliet** the policy maker

And most importantly **Diane** the service user

Let's start with Jacqui the development worker:

## **The development worker [Jacqui]**

I'm a development worker with the McDeeshire Family Centre.

I never used to care about evaluation. In fact I never did any. I just got on with the job. And was that really so bad?

Then suddenly we had forms galore. I couldn't get any work done. Whatever we did we monitored morning, noon and night.

The worst time was when it was my turn to staff the advice helpline and Mrs McTavish phoned in. Before I could help her I had to ask her all these questions about her faith and ethnicity. And then I got to the question about sexuality. Mrs McTavish paused a moment and then said "Dearie, I'm 97 and all I want is a new bus pass! What's sex got to do with that?" I was mortified.

Thank goodness we've stopped all that. And I've discovered proper evaluation.

I now spend most of my time at the centre working with young people. We have evaluation built into our work. We do baselines, we get feedback from schools and most importantly we take time to get feedback from the young people in creative ways. At last I don't just sort of feel and hope that I'm doing a good job. I've got proof I can point to.

For example, sometimes when a young person goes off the rails or doesn't turn up for a session it can be hard to feel I'm making any progress at all. Our evaluation though tells me that I'm good at helping young people find ways to address their problems at home, make the right decisions and avoid trouble. That's really important to know to keep me going through the tough times.

Of course I'm not perfect. It became clear from evaluation that I wasn't making much progress in helping young people at school. So I've got to know some of the teachers and I spend more time focussing on school stuff in sessions with my young people. I just wish that I could share more of what I know from evaluation with policy makers.

But all in all evaluation is great. I really feel like I'm getting better at my job. And those days when I'm not so positive it really helps to read positive feedback from a young person saying I have made a difference to their life. What can be more rewarding than that?

## **The Manager**

I am the manager of the Centre. Or should I say manager, leader, networker, appeaser, politician, finance wizard, fundraiser and general miracle worker.

I seem to spend all my time finding the next bit of money to keep the Centre afloat. And when I'm not doing that I'm sitting in some strategy

meeting. Most of them are really dull but I daren't miss one in case some plonker from the Council makes a decision that affects my Centre and I am not there to stop it!

But life is a bit easier now we've got better at evaluation.

Evaluation used to be something someone else did – an inspector, a researcher or a consultant. We'd be working away quietly and then one of these evaluation robots would come in shouting "evaluate, evaluate" waving their checklist around and we'd all hide under the tables until they glided away leaving their report behind. There are about 15 of these reports caked in dust in the back of the stationery cupboard.

But now we've got better at evaluation we do some of it ourselves. And don't get me wrong. It's been hard work. We took ages to get to grips with the language of outcomes. And some of the staff were resistant to doing any more monitoring or evaluation. They gathered lots of stats and felt that was enough. But they didn't seem to be asking the right questions about the difference we were making. One time I even heard one of my development workers talking to poor old Mrs McTavish about sex!

However with a lot of talking, thinking and of course outstanding support from Evaluation Support Scotland we've managed to turn it around. We've stopped doing the pointless paperwork of old and got come outcome focussed systems in place. There has been a bit of trial and error but my team are learning to embrace evaluation and what it can give us. It is much easier now to pull out the information I need to use in funding applications and reports to funders to show that we are achieving our outcomes, how and why.

Evaluation has also thrown up issues with our services. For example we realised we were getting better outcomes in our 1-1 work if we also offered group support at the same time. So that's what we do now.

And another time I noticed a pattern of inappropriate referrals from one of our referral agencies. So we put in place an agreement with them so we could get the right referrals at the right time.

It's all brilliant! I just wish that I knew what my funders did with all the evaluation reports I give them. Evaluation is useful to me. But do they use it? Or do they file it away never to be looked at again.

Never mind. With funding getting tighter I'm glad we have a good case to make about the impact of our work. Evaluation has helped me make the Centre better and provide more and better services. And I can say with confidence – I'm not just a manager, I'm an achiever! That's the best title of all.

## **The Council Official**

I am the Director of Community Services at McDeeshire Council. Or as she [points to the manager] would say – I'm the plonker from the Council.

We've always done evaluation in the Council. Public surveys, focus groups, citizen's juries, inspections. You name it we do it. And there's always someone from central Government on the phone asking for some bit of data or other.

Yes we do evaluation. But we don't always learn from it. In fact last year I put together a report about one of our services. I had a great section on lessons learned and things we could improve. Somehow by the time the report had been through the Chief Executive's office and corporate communications it had turned into a glossy document setting out the 10 reasons why McDeeshire is the best council in the world. Apparently we have nothing to learn. And to be fair when our own funding seems to depend on showing Government how brilliant we are it's hard to be honest.

But to come back to evaluation. We really want to make a difference to vulnerable people's lives. We want to know what works and why. Which is why we value the Family Centre. They can give me robust evidence of their impact so I have been able to continue their funding. And there's more to it. We've stopped pretending that we fund the Centre to end poverty and they've stopped pretending they can end poverty by 31 March. We're purchasing more realistic and meaningful outcomes.

And we work in partnership. The evidence we get from the Centre has really helped me shape my part of the Single Outcome Agreement. We actually have outcomes in our Outcome Agreement!

I just wish other voluntary organisations were as good as the Family Centre at setting and measuring outcomes. And for that matter some of my own Council colleagues! I would also love to be able to feed more learning from evaluation into national policy making. If we could use our evaluation better perhaps we'd be able to address the big problems we face.

But no more moans! Evaluation is vital for me. Relevant evaluation is invaluable in making day to day decision about what to fund and how to improve my services. That's what keeps me smiling!

## **Funder**

I work for the Dust Trust. We get our funding from the profits made by the sale of cleaning products. And the profits are down so we have a lot less money to give out to local charities like the Family Centre. In fact at one point last year the Dust Trust nearly went bust.

So we have tough decisions to make.

The Dust Trust Trustees want to focus their grant making on areas where they can make a difference. So we only fund voluntary organisations that can evaluate and report on their impact.

And we've set outcomes for our grant making.

We want to increase people's education attainment (more sussed),  
We want to improve people's engagement and interest in their community (more fussed)  
And we want society to be more fair and equal (more just).

We want to evaluate whether Scotland is, thanks to the Dust Trust, sussed, fussed and just (you see how much fun you can have with outcomes!).

So we review reports from funded projects against our outcome framework. And we commission reviews and studies. This helps us see what difference we've made and report on the impact of our funding.

Our own evaluation would be even better if voluntary organisations were better at reporting to us. Not everyone writes plain English reports like the Family Centre. The Family Centre sets out what they have done and what difference they've made **and** what they've learned. It's easy to read and I believe what they say because they are honest. They don't exaggerate or spin it. They give me facts that back up what they say. I get a real flavour of the challenges and rewards they experience. Not everyone is like that.

Also I wish we could share more of our learning with local and central Government.

However overall things are good. We've got a much better handle on the impact of our work. And we are clearer about what we do with funded organisations reports – they don't gather dust at the Dust Trust. And that's helped us build better relationships with our funded voluntary organisations. Wow! Funders and funded organisations working better together. That can only be a good thing!

### **Policy maker**

I work for Scottish Government and I've just started a new job in charge of policy on vulnerable families. Last week I was in charge of policy on turnips so I have a steep learning curve!

Yesterday I sneaked out of Victoria Quay to visit the Family Centre. It was eye-opening talking to the manager and the staff about what they do. But better still I was able to take away their annual report and an evaluation report they had written for something called the Dust Trust. I used the information in these reports to advise the Minister on the new strategy on vulnerable families.

There wasn't much call for evaluation in the turnip department.

But here in Vulnerable Families it is important that policies and strategies focus on what works for whom in what circumstances. Statistical evidence is essential but figures don't tell the whole story. We need qualitative information to help us interpret the numbers properly. This is where the ground outcome information comes in. It helps us understand how and why change happens. The Family Centre is going to feature in our strategy document as a case study of effective family focussed work.

Of course I have to be honest. Some Government policy on this subject can be influenced by media hysteria rather than pure evidence based decisions. And funding is tight. We've got less and less money here in central government and I know from my work in turnips that the Root Vegetable Lobby is mounting a powerful campaign to stop funding cuts in that area.

So I'm going to need a really strong case to make sure we don't take a big hit here in Vulnerable Families. Thank goodness the Family Centre isn't one of those charities that shouts loudly but can't back it up with good evidence. Without them I might not have had made any reference to the voluntary sector at all in my advice to the Minister. And actually I would never even have heard of the Family Centre if it wasn't in the Minister's constituency!

I wish we had more evidence from councils and voluntary organisations like those in McDeeshire that helps make the case. But I'm not sure how we get it. I can't visit every organisation for myself like I did with the Family Centre. I need more easy to understand outcome reporting.

But we are getting there. We never used to use evaluation at all for policy making. Now we are drawing on evidence wherever we can to address what we are calling the 'wicked problems' and create better policies for the people of Scotland. That's better than turnips!

### **The Service User**

I am a service user and I've been coming to the Family Centre on and off for years. When I first came to the Centre as a teenager nobody ever asked for my view on anything. Things would happen and I'd no idea why.

One time my link worker changed – I think that's called staff turnover

One time the centre's name changed – I think that's called rebranding

One time the centre closed down for 6 months – I think that's called arson.

All that time no one asked what I thought.

But later things did start to change. By this time I was in the mother and babies group. And suddenly they wanted feedback on everything. And I

have to tell you it's quite a challenge to fill in a 3 page questionnaire while simultaneously breastfeeding twins.

And they did ask some strange questions. For example: "on a scale of 1 to 10 how satisfied are you with the refreshments?"

I gave it careful thought: the biscuit was fresh but no chocolate. Is that a 5 or a 6? I tried to look at the woman next to me to steal her answers. But she'd circled 10 for everything. And honestly - no rich tea biscuit is worth 10 points.

But it's not really the Family Centre's biscuits that are important to me.

A year ago I had a real set back. I had a breakdown and for a while things were terrible. The Centre's development worker got me involved in a therapy group. The group has been brilliant at helping me. I have increased my resilience and improved my self worth. And I have learned fancy new words like resilience and self worth.

But I know this because we've done evaluation. We use lots of different methods to unpack our personal journeys during our time in the therapy group. We've all had ups and downs. But it's amazing to look back and what we were like when we first started compared to now. My evaluation tells me that a year ago I couldn't get on a bus on my own. It is painful to remember that. But it's amazing to realise that now I hop on and off buses no problem. I'm so much more confident.

My only question is: I don't really know what the Centre does with all this evaluation information. I think that our feedback might have helped them get more funding to keep the therapy group going. But I'm not really sure.

But from my perspective I love evaluation! Between you and me it's just a posh word for looking back. But looking back also helps me look forward. I've come so far in the last year. How much further can I go?

**Development Worker** - Jacqui McDowell, ESS staff

**Manager** - Emma Crawshaw, ESS board member

**Council Official** - Kirsten Gooday, ESS board member

**Funder** - Linda McKie, ESS board member

**Policy Maker** - Juliet Wilson, ESS staff

**Service User** - Diane Kennedy, ESS staff

The discussions following this session are summarised in the conference report.

## **Workshops**

### **Workshop 1: Community Food and Health Scotland (CFHS)**

The workshop focused on how intermediary organisations can use evaluation to influence policy and build capacity.

Community Food and Health Scotland aims to ensure that everyone in Scotland has the opportunity, ability and confidence to access a healthy and acceptable diet for themselves, their families and their communities.

CFHS was approached to fund external evaluations for organisations but recognised it was a better use of resources to build organisations' capacity to self-evaluate. CFHS and ESS developed this work with six projects who worked together as a collaborative. The projects received support from CFHS and ESS, both one-to-one and as a group. They also provided peer support for each other and a lot of learning in the collaborative came through sharing experiences and ideas between community food projects. The challenges for the work included:

- Small organisations lack the capacity to self-evaluate.
- Lack of evidence of outcomes.
- Lack of recognition of value and contribution of small CFH groups.
- CFHS uses self-evaluation to:
  - Measure community statistics against community need.
  - draw out constructive criticism.
  - bring in new and innovative work which can influence local policy.
  - track the progress of projects.
  - apply for funding and report to funding bodies.
  - build capacity.
  - foresee shortfalls so we can act on them.

**Geraldine O'Riordan**, Development Officer (Engagement) and **Katrina Reid**, Development Officer (Impact), Community Food and Health Scotland

### **Partnership Drugs Initiative (PDI)**

The PDI is a relationship grant-making programme for the voluntary sector working with children and young people affected by drugs and alcohol. The programme has been designed to continually look at how to encourage and promote self-evaluation to develop a greater understanding of the impact funding makes to children and young people. The PDI funds and promotes voluntary sector work with vulnerable children and young people affected by substance misuse.

The workshop focused on how funders can use evaluation to learn about the impact of a funding programme.

PDI was founded on the principle of knowing what difference funding makes. Practice and learning to embed policy. Developed evaluation framework. Organisations' experience in own words – training/ report.

A major challenge was to develop and refine a suitable framework and to make outcome reports relevant. There was some discussion on the difficulty of getting a report to be comprehensive.

The fund found that clear reports were the missing piece of their evaluation jigsaw. Do organisations have sufficient guidance of requirements?

This led to PDI putting together improved guidance, thinking about the evidence base required by any organisation and why this is needed. PDI have worked with services to improve the quality of their reporting. Logic modelling can improve clarity. Gaps in information and knowledge need to be acknowledged.

Discussions centred around logic modelling, putting together a common reports framework, circulating examples of good reports, giving intensive support to funded organisations in writing their first reports and the need for proportionate reporting.

**Elaine Wilson** is Programme Manager for the Partnership Drugs Initiative (PDI) a funding programme within Lloyds TSB Foundation for Scotland. Working for Lloyds TSB Foundation for Scotland for the last 9 years, Elaine has spent the previous 5 working on the PDI and has been in the role of Programme Manager for the last 2 years. Elaine is Director for the newly formed Scottish Drugs Recovery Consortium and is a Trustee for a small Edinburgh based grant-making Trust.

### **Edinburgh Cyrenians**

Edinburgh Cyrenians provides solutions to poverty and homelessness by helping people who've had severe problems, to help themselves improve their lives.

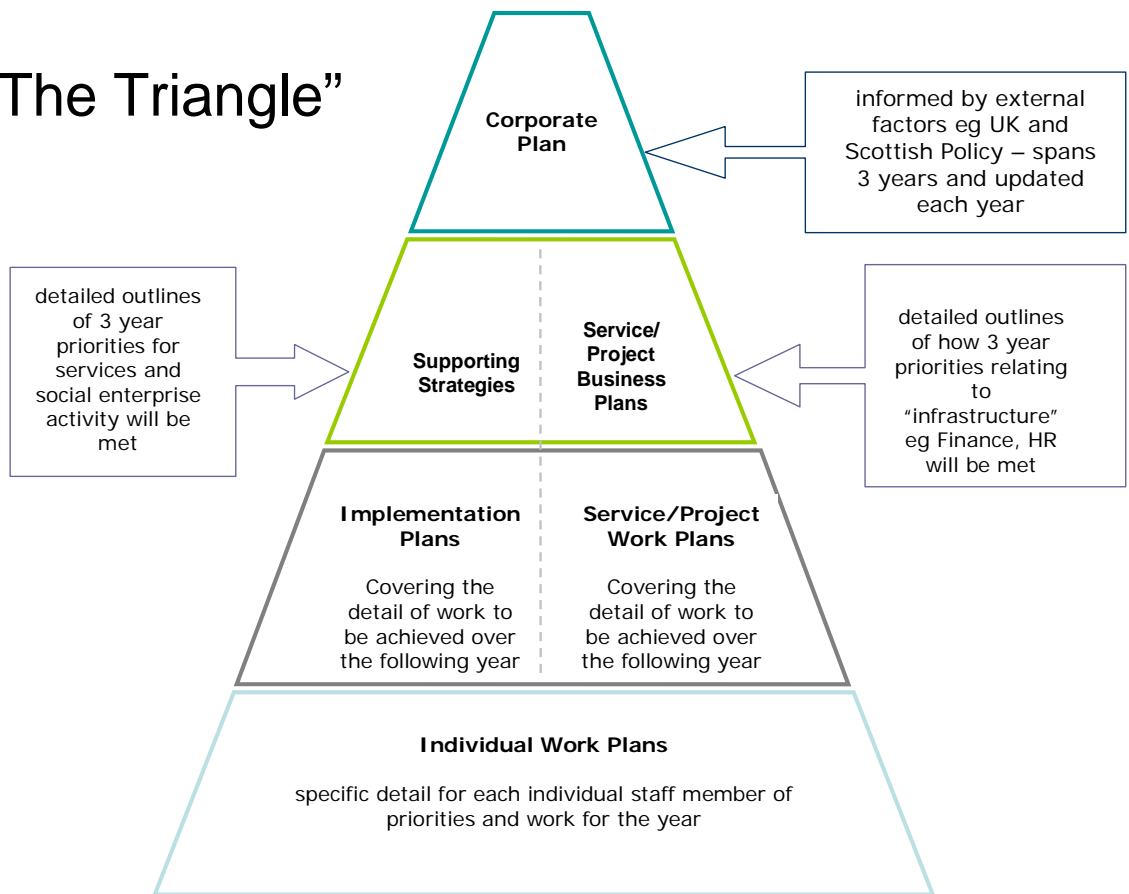
The workshop will focus on how Cyrenians have linked the individual success of staff members with the success of the whole organisation through use of planning, monitoring and evaluation, regular supervision and annual performance review.

### **How organisations can integrate evaluation and staff management**

1. Edinburgh Cyrenians provides solutions to poverty and homelessness by helping people with severe problems, to help themselves. Services include residential care for young people, healthy eating, employability, homelessness prevention, mediation between young people and their parents, and access to the private rented sector. They have over 60 staff, work in 5 local authority areas and an annual turnover of £2.5million.
2. In 2005, they recognised they did not have the right systems in place to demonstrate the effectiveness of their work for funding or to tell them whether what they were doing was consistently good. In particular the Director wrote strategic and operational plans but these were not generally owned by staff.

3. So they introduced a consistent outcome focussed planning process across the organisation and an internal reporting including an annual results report which was fed back to staff.
4. Staff liked the annual results report but overall there were challenges:
  - Staff found it hard to plan and managers found it hard to facilitate planning meetings
  - Staff found it hard to write clear reports.
  - Lack of systems to collect evidence – anecdotal evidence only.
5. There was also a tension between what staff did and what plans said they should be doing! The staff satisfaction survey showed
  - only 67% of staff understood their role and responsibility
  - only 53% understood how their performance would be measured.
6. To address these issues they created, with the advice of an HR consultant and staff consultation and training, a new system to link organisational planning with staff appraisal. (see the 'triangle' diagram below).
7. Teams now create their plans each spring and individual staff objectives flow from the team objectives. Staff objectives are mainly task based but can also relate to personal development and behaviour. Progress is reviewed in regular supervision and at the end of the year staff and line manager together score achievement of objectives using an evidence-based approach.
8. There is genuine buy in to this new system which has also created a greater focus and shared understanding of what the organisation does. On top of this the process has shone a light on poor performance and managers now have a vehicle to highlight behavioural issues.
9. In the next staff survey:
  - 92% staff understand how their performance would be measured.
  - All staff thought that bringing their performance review in line with the planning process would make it easier to measure performance.
  - 97% of staff understood their role and responsibility.
10. The work goes on! Staff still find it hard to set SMART objectives. They find it hard to score objectives and what counts as evidence of achievement. To help with this there is now an in-house learning programme for staff and managers and they will be developing a Key Worker Practice Model and competencies framework.

## “The Triangle”



**Pam Orchard** is the Assistant Director at Edinburgh Cyrenians where she has responsibility for organisational planning, the charity’s HR strategy and development of services. Pam has previously had roles at YMCA Scotland and the Volunteer Centre Edinburgh.

### Venture Scotland

This workshop focused on how organisations can use evaluation for learning.

Venture Scotland runs an outdoor-based personal development programme for young people aged 16-30, who face complex and difficult problems.

The organisation came from a position of feeling they lacked a clear mission or a clear evaluation strategy. They agreed aim, outcomes and outputs through structured facilitated business planning, designed a Weaver’s Triangle and defined a new programme structure clearly linked to outcomes. “What’s the Point?” became a way of working.

They developed a bespoke matrix tool for measuring 8 key skills that are the focus of their programme:

- Positive Relationships – being able to work together with others
- Confidence: being able to try new things and mix with new people
- Assertive communication: being able to express own needs appropriately
- Looking after Self: having a healthy routine
- Dealing with Problems: having tools to deal with difficult situations
- Self Esteem: liking and valuing yourself
- Positive Attitude: having the resilience to keep going and stay motivated
- Responsibility: being reliable and understanding what it means to contribute

The organisation acknowledges that people can seem to temporarily move backwards as they develop – this is just part of the process.

Young people and volunteers are actively involved in the organisation and their evaluation processes:

- A positive culture in which young person's opinion counts
- Active reviewing
- Young person's forum
- Case study work
- Creative approaches; eg video, poetry

They have secured money for an external evaluation which will aim to learn from drop outs and evaluate the wider impact of the volunteer programme. There is also a desire to build the evidence base to ensure ongoing support for the organisation.

Venture Scotland Evaluation Learnings:

- *"What's the Point?"* is a very important question to ask
- Link evaluation to your wider business planning process
- Put evaluation and facilitation costs into your budgets
- Ask your funders for support
- Use a mix of qualitative and quantitative approaches
- Invest in the process and you will be rewarded

**Jane Bruce** has been Director of Venture Scotland for the past 4 and a half years. Her small staff team works in partnership with over 120 volunteers to run an inspiring personal development programme for vulnerable young people from across the Central Belt. Jane moved to Scotland after several years working in London for Cancer Research UK within fundraising, marketing and volunteer development. Her passion and expertise centres on helping people to realise their potential.

### **Climate Challenge Fund**

The Climate Challenge Fund is all about giving communities the means to tackle climate change by reducing their carbon emissions. The Fund was

established by the Scottish Government in partnership with the Scottish Green Party and is administered by Keep Scotland Beautiful.

The workshop focused on how organisations can use evaluation to build understanding for large scale policy.

Hard indicators for funded projects are in the form of CO2 emissions but the fund found it challenging to find clear measures. Some projects take a Weight Watchers type approach to helping people reduce their addiction to carbon. Other projects focus more on activities such as gardening, encouraging people to work together on a project. In all cases community engagement is important. Projects may be able to learn a lot from the people who didn't take part.

The outcomes and indicators can be very complex as they include behaviour change. The fund has ambitious outcomes. There were issues with community groups' abilities to plan, define and evaluate outcomes. To start with there was no programme evaluation for the fund.

The organisation has learned about the importance of learning about process and how that can influence outcomes. Projects with multiple funders can find that in-project evaluation gives a more complete picture of the logic of outcomes, not limited to the part of the picture each individual funder sees.

The group discussions asked whether the easiest to measure is the most effective and concluded probably not. Projects must identify needs to avoid making assumptions. Given the amount of behaviour change that projects are aiming for, it is essential for both the fund and the funded to understand attitudes and motivations. There were discussions around measuring behaviour change and how to make these changes sustainable. There were also discussions around how to engage the wider population, covering visibility of action, social norming and emphasising the financial and health benefits of environmental actions.

**Shelagh Young** is project manager for the Climate Challenge Fund supporting alliance. She works closely with CCF funded communities through a programme of networking and learning events, supporting communities running a broad range of greenhouse gas reduction projects including transport, local food and community owned renewable energy. She is interested in how the experience from the CCF funded communities can provide lessons for a low carbon Scotland.

Shelagh has 25 years experience in the voluntary and public sectors in communications, campaigning and change management. She has worked as a senior communications and campaigns manager for Oxfam and subsequently as a deputy director at Scottish Human Services Trust leading on partnership working. From 2004 -2008 she ran her own coaching, training and facilitation business 'Future Works'. She is also a

volunteer athletics coach and has recently taken up knitting to remind herself that nothing is impossible.

Discussions from the workshops are summarised in the conference report.

## **Funders Session**

Welcome back from your lunch! I am Maureen McGinn and I will be running the next session of your conference which is about reporting to funders.

A bit of background about me: I used to be Chief Executive of Laidlaw Youth Trust. I am on the Scotland Committee of Big Lottery Fund.

Right now I am a member of the Harmonising Reporting Working Group. This short life working group is made up of people from funders and charities and is supported by Evaluation Support Scotland. Our role is to identify practical steps that funders could take to make reports and reporting more and less burdensome useful for funders and for funded organisations.

You can find out more about the working group on the ESS website.

Here's the problem: Voluntary organisations spend time reporting to their funder but don't always find the process of reporting or the report itself very useful. They might have to report in different ways to different funders. This takes time and yet the resulting reports don't tell the real story of the organisation or project. Even worse, the reports don't help funded organisations to learn and improve. Funders also find that some of the reports they receive don't tell them what they need to know. The reports don't help them understand the difference their funding has made.

This is not always true but we think things could be better.

So that's what the Harmonising Reporting working group is about. Our job is to come up with conclusions and top tips for funders and funded organisations about how to make reporting more useful. We'll put our ideas to the Scotland Funders Forum in March.

I must stress that I make no promises about what will happen after that. But I can tell you that there is an appetite amongst many funders to make reporting more useful – and that in itself is a good first step.

In the next few minutes I'll give you a preview of three of our more general conclusions. Then you will have a discussion at your table. So listen carefully!

Our first conclusion:

**Reporting is useful and effective if there is a good relationship between the funder and the funded organisation**

We found that if funders and funded organisations trust and understand each other, reporting becomes more useful and less onerous. Building good relationships takes time and resources so it's not easy. But it's worth it.

From my experience a good relationship means **no surprises!**

... And when the end of year report came I knew what to expect – and I got what I wanted.

Our second conclusion: **The report should be useful for both the funder and the funded organisation.**

Few of us really love writing reports. But I don't believe that report should be a horrible chore. If you are a funded organisation you should view the report as a celebration of what's gone well. The report should help you focus on what has not gone so well – and why. It should help you think about learning for the future.

But if the report is NOT useful to the funded organisation, for example because the funder is asking for meaningless information, then it probably won't be useful to the funder either!

The last conclusion is about **what makes a good report**

In the Harmonising Reporting working group we looked at examples of reports from funded organisations that funders thought were really good.

Sadly we didn't find the one perfect report that we could put on a website and say "everyone else – write one like this please"! However we did consistently come up with characteristics that good reports had in common.

One of these characteristics is that a good report **tells the story** of the funded organisation - or project. In other words, the good report gives a flavour of how and why things happened and what difference was made.

Another factor that makes for a good report is honesty. It might surprise you to learn that funders aren't stupid! We know that sometimes things go wrong. So if a funded organisation says that everything was perfect we start asking questions. We might not believe the report at all.

I'd now like to give you a chance to tell us what you think about what makes reporting useful – whether you are a funder, a funded organisation or someone interested in good evaluation and reporting. You'll find a piece of [pink] paper on your table with 3 questions for discussion.

Obviously this is not a full consultation and remember that I'm making no promises of radical change. But we thought it would be really useful to get quick feedback on a few of our ideas to add value to our work. And

hopefully we'll get some discussions going amongst the funders, funded organisations and others in this room.

I can promise you that I will take account of what you say. I have a reporter at each table to feed back to me! And ESS and I will feed your comments to the Harmonising Reporting working group and onwards to the Funders Forum.

So now it's over to you!

**Maureen McGinn** was until recently Chief Executive of the Laidlaw Youth Trust (LYT) Maureen is on the Scotland Committee of the Big Lottery Fund in Scotland. She is a member of Scotland Funders' Forum and the Vice Convenor of the Scottish Grant Making Trusts Group.

Discussions following this session are summarised in the conference report.

## **Plenary - Fitting the Pieces Together, Steven Marwick**

### **VALLATION**

Here's a word that sounds and looks a bit like evaluation but it means something different:

This means the act of building walls

Building is a useful idea when we think about evaluation.

In order to achieve good evaluation we need to BUILD and piece together

- systems and processes that give us the right information
- Different perspectives on evaluation
- Different ways of using evaluation – so that we learn and improve.

BUT walls can also get in the way

So let's try and turn this word vallation back into the word evaluation. I'll remove one of the Ls add the letter E

E- VALATION

E means 'out' in latin

And this is useful too

- OUTcomes – we need to focus on what difference we're making not just what we are doing.
- getting OUTside our walls, looking afresh at things, stepping back and looking at what's working and why
- knocking OUT barriers – creating a climate of appropriate trust and accountability

We're nearly there

EVALATION

But this doesn't mean anything.

I need to add another letter.

The letter U

Because Evaluation doesn't mean anything unless U are in it!

One of the most important pieces in the evaluation jigsaw is

YOU

So let's find out where YOU are in the evaluation picture

I want you to think about what piece of the evaluation jigsaw has been revealed for you today?

Maybe your evaluation jigsaw piece came from the first session. We heard different perspectives on evaluation. Did this tell you something new about other people's perspectives, or crystallise how your own perspective?

Then you went to a workshop and you heard about how other people are putting the pieces together. May this give you an ideas or a challenge?

After lunch you heard about reporting to funders. Did this raise an idea or a question for you?

And you've also had lunch and coffee. Maybe you spoke to someone that gave you an idea or a thought about the evaluation jigsaw.

Now hold that thought!

You have a task – and you have to accept it.

In an envelope on your table you will find some jigsaw pieces.

When I tell you I'd like you to

1. Take a jigsaw piece – and a pen.
2. Get up from your seat – if you are comfortably able to do so.
3. Find someone you haven't spoken to so far at this conference.
4. Ask **them** to tell you. What piece of the evaluation jigsaw has been revealed for you today? It doesn't have to be an earth-shattering revelation. It might be a statement, a problem, a question or a comment.

5. Write down what **they** say on **your** jigsaw piece.
6. And then hand your jigsaw piece to the crack team of ESS who are standing by the jigsaw board [where is it]. They are going to put up your jigsaw pieces on the board. Before you leave the conference you'll be able to have a look at the board.
7. Then go back to your seat

Oh – and you only have 5 minutes for this. So ready, steady go!

Feedback from the jigsaw and the evaluation forms are included in the conference report.

**Closing Words** from Mary Craig

I hope you've all found today as stimulating as I certainly have.

We've looked at evaluation from a number of different perspectives and hopefully that has given you insights into the value of evaluation for everyone involved in your work. Reading the jigsaw pieces, it's fascinating to see what has leapt out at different people

So I hope that everyone is going to go back to work tomorrow aware of how evaluation can help you improve the way you work and thus improve the lives of the people you work with.