

A walk down Harmonising Reporting memory lane

Harmonisation pilot (2006)

In 2006 ESS ran a '[harmonisation pilot](#)' in central Scotland to: 1) give evaluation support to some voluntary organisations that provide services for children and young people; 2) review the reporting requirements of each of their funders and see if the reporting process could be made less burdensome and better meet needs, and 3) to identify lessons that could be shared more widely.

The pilot involved 1-1 meetings with the voluntary organisations and local authorities and 3 collective meetings to share ideas and learning.

The **main areas of learning** were:

1. Not all voluntary organisations with multiple funders have complex or onerous reporting requirements. However, minimal reporting creates its own problems.
2. Many pilot organisations did not have a particularly strong relationship with their funders – particularly the local authority.
3. Creating an opportunity for voluntary organisations and funders to talk to each other in a safe space helps break down myths and barriers – communication between funders and voluntary organisations is important in creating trust and learning.

The pilot participants helped ESS draw up practical challenges for funders and for voluntary organisations which went onto shape the creation of the [Evaluation Declaration](#).

The Evaluation Declaration (2006)

The Scotland Funders' Forum '[Evaluation Declaration](#)' sets out 5 statements that describe why monitoring, evaluation and reporting are important and what they should achieve:

- Evaluation is **valuable**: evaluation needs to add value to practice.
- Evaluation is **relevant**: evaluation must be used, shared and acted on.
- Evaluation is **proportionate**: monitoring and evaluation systems and processes should be the right fit for organisations and service users and not burdensome.
- Evaluation is **supported**: evaluation works when people and organisations are supported to do and use evaluation.
- Evaluation is about **looking from inside and outside**: learning comes from self-evaluation as well as external scrutiny.

The Evaluation Declaration was written by ESS and the Big Lottery Fund with input from SFF members, and launched in 2006.

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Evaluation Declaration Health Check (2007)

In summer 2007, ESS was commissioned by the SFF to create a self-assessment tool to help funders think about what extent they meet the Evaluation Declaration principles. ESS created the tool (known as the [health check](#)) and tested it with 11 funders, which received a personalised **evaluation health report** setting out what ESS thought the funder does well and making suggestions to make their monitoring and evaluation practice even better.

The tool was filled in by Big Lottery Fund, Comic Relief, Dumfries & Galloway Council, Fife Council, Forward Scotland, Laidlaw Youth Trust, Lloyds TSB Foundation for Scotland, Perth & Kinross Council, The Robertson Trust, Scottish Community Foundation, Voluntary Action Fund.

All 11 funders said the tool was straightforward and useful. It was more difficult for some funders with a range of funding streams but generally they thought it was a worthwhile exercise. It helped them reflect on their systems and provoked discussion between staff. Each funder involved between 1 and 10 staff in the process (the average was 3.5). All but one had a meeting to complete the tool. ESS was given permission to continue to use it as part of our work and to publish it as a resource on our website.

Follow up feedback from 7 of the 11 funders suggested that the tool was useful, although some more than others. Everyone would recommend it to others. Everyone could evidence some improvements in their M&E and reporting practices since they'd completed the Health Check.

Since then and through other work ESS used the health check tool with Dundee Fairer Scotland Fund and Wood Family Trust.

Turning the Tables (2007)

Also in 2007, New Philanthropy Capital (NPC) was commissioned by SFF to undertake research which became [Turning the Tables](#), published in 2008. NPC investigated the costs and benefits of reporting by charities to funders. The charities in the study spent 5% of their funding on reporting to funders but this reporting was not always benefiting charities or funders. NPC looked at how charities could create a standard report for all their funders. NPC found standard reports help improve the quality and efficiency of reporting, give a greater focus on outcomes and evaluation, and free up more money to improve services.

Gate (2007)

In 2007 four funders who were funding Gate - a youth project in the Borders - decided to undertake their own harmonisation pilot to reduce the reporting burden on Gate. The four funders were BBC Children in Need, Laidlaw Youth Trust, the Rank Foundation and The Robertson Trust.

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The plan was that Gate use the Children in Need monitoring material to create a single report for the four funders. The hope was that Gate would spend less time on unnecessary monitoring and would have increased skills to evaluate which in turn would make them more likely to access more funding in the future. ESS provided some support to Gate.

Gate did produce one report for four funders. But in reality the pilot was not a success. It took a lot of hard work and not all funders' needs were met. ESS was asked by the four funders to review what happened and a report of the [Gate experience](#) was published by ESS in September 2007 and launched at an event for funders and voluntary organisations.

The **key lesson** was that before a voluntary organisation can produce a single report, it needs to be clear about what information to collect. Not only was there been a challenge getting the right information together to report but also in writing the report itself. The funders did not prescribe the format of the report – which was helpful. But this flexibility meant Gate was not clear what the Funders wanted the single report to contain. Joined up reporting did **not** save resources in the short term in this case.

Harmonising Reporting working group (2009)

Despite the [Gate](#) experience, evidence from other ESS work was that organisations that had good outcome reporting systems in place **did** save resources if they don't have to produce lots of different reports. And there were other benefits. Edinburgh Cyrenians won several big tenders and said this was partly due to become better at measuring and reporting on outcomes. Other Laidlaw Youth Trust was reaping the benefits of implementing the Evaluation Declaration by getting better reports themselves from funded organisations.

Most importantly [Turning the Tables](#) had concluded that £millions were being wasted on poor reporting and yet funders were not addressing this. In March 2009 the Harmonising Reporting Working group was established to explore this issue.

The remit of the group was to identify practical steps that funders could take to:

- Make reports more useful for funders.
- Make reporting more useful for funded organisations (and less burdensome).

The group was formed of Lloyds TSB Foundation for Scotland; Dumfries & Galloway Council; Angus Council; Scottish Government Third Sector Division; Forward Scotland; Big Lottery Fund; The Robertson Trust and Voluntary Action Fund. There were also two voluntary sector 'users': Circle Scotland (which had taken part in the *Turning the Tables* research) and Sense Scotland.

Evaluation Support Scotland facilitated and supported the group through 5 practical meetings between August and December 2009 looking at monitoring

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forms, guidance and examples of good reports from different funders and sharing our experiences.

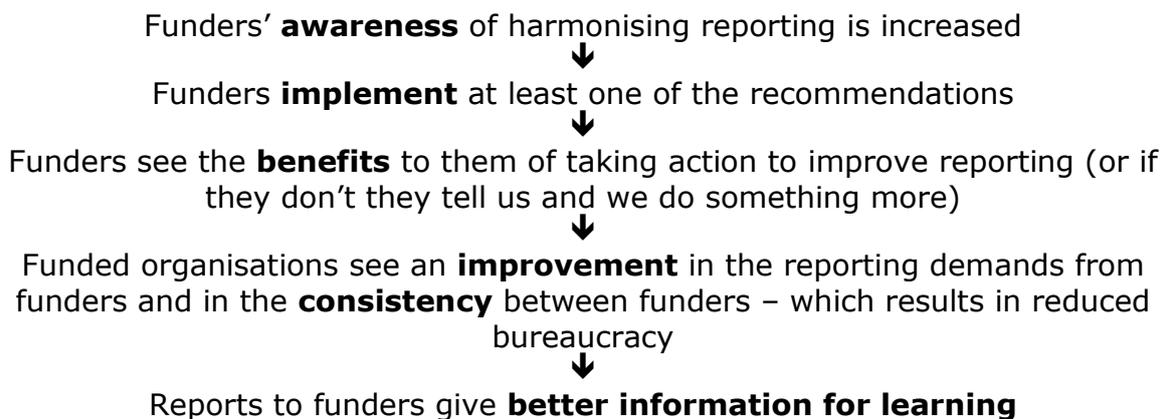
The group identified five broad areas of work where funders (and funded organisations) could take action to make reporting more useful.

1. Harmonising **how** we report - Forms and format
2. Harmonising **what** goes in the report - content
3. Harmonising language
4. Supporting Reporting – capacity building and guidance
5. Financial reporting

Following wider consultation on a summary of our main conclusions [Harmonising Reporting](#) was approved by the Scotland Funders Forum in April 2010 and published with John Swinney's endorsement in July.

Implementing Harmonising Reporting

ESS was commissioned to support the implementation of [Harmonising Reporting](#). We set out to achieve:



To achieve these outcomes we:

- Carried out awareness raising activities
- Surveyed SFF members and asked them to tell us what they were doing to implement Harmonising Reporting. 20 funders responded.
- Alongside the funders survey we did an online survey in early 2011 of funded organisations to ask funded organisations what reporting is like for them now. 32 organisations responded.
- We created a new workshop for funders, "Making Sense of Reports", to address one of the recommendations. This workshop successfully launched in 2011 and now forms part of the ESS core programme of workshops.