

Appendix 1: CHECKLIST - Elements of a local evaluation report

Detail CFN requirement

Background and description

1. FST standard text:

Community Foundation Network is responsible for using its local giving expertise to ensure the effective implementation of the £50 million UK-wide Fair Share Trust (FST) programme, funded by the Big Lottery Fund. The FST aims to build community resources and skills, and improve the environment in disadvantaged areas that have not received their fair share of Lottery funding in the past.

2. Programme aims standard text:

The Fair Share Trust aims to:

- build capacity – the confidence, skills and experience of individuals and communities
- build social capital – the networks, relationships and contacts of individual, voluntary and community groups and statutory bodies within communities
- improve 'liveability' – the physical space in which communities exist
- achieve sustainability – a positive lasting legacy in these communities

3. Introductory text around Local Agent involvement:

"X Local Agent is contracted by CFN to deliver FST in [neighbourhood or area]"

The wider work of the Local Agent

4. Programme design:

- local panels
- local decision-making

5. Local priorities

Programme performance information

6. Programme outputs, e.g.

- numbers of applications
- awards made
- number of rejections etc

7. Programme expenditure

Evaluation evidence & findings

8. Impact and achievements against local priorities and against FST objectives and indicators □

9. Assessment of the programme's processes including:

- setting up and managing Local Panels
- advertising the fund
- processing applications with local panels
- making and managing grant awards etc

10. Case studies and illustrations – the work of the funded projects – and other programme achievements

11. Conclusions, good practice and lessons learnt

Appendix 2: Sample contents template Contents

1. Executive Summary

1.1 FST summary

1.2 Key findings: successes; learning and recommendations

2. Conducting the evaluation [and self evaluation]

2.1 Background and purpose

2.2 Methodology, including:

- Desk analysis
- Survey of panel members/ funded projects/ beneficiaries/ wider community/ partners
- Focus groups with members/ funded projects/ beneficiaries/ wider community/ partners
- Interviews with members/ funded projects/ beneficiaries/ wider community/ partners

2.3 Case studies highlight specific projects which emphasise conclusions and learning

2.4 Comparison with similar projects and activities

2.5 Strategic added value between FST and any similar/other work in the FST Area

3. Programme background, context and rationale

3.1 What is Fair Share Trust standard text [see Appendix 1]

3.2 The changing nature of funding for the third sector external factors affecting FST

3.3 The local context – specific aspects of the local issues, local priorities and local responses

4. Fair Share Trust – Key facts and figures

4.1 Programme aims standard text [see Appendix 1]

4.2 Local priorities

4.3 Any baseline data

4.4 Project outputs and expenditure, including:
- Commentary on project expenditure

4.5 Management and administration costs in context of delivery process

4.6 Conclusions on outputs and expenditure

5. Fair Share Trust – Impact assessment

5.1 Strategic vision

5.2 Achievements against programme objectives

5.3 Additional programme outcomes

5.4 Sustainable impact

5.5 Conclusions on impact

6. Conclusions and lessons learnt

6.1 Key barriers to achievement

6.2 Key opportunities

6.3 Management and delivery processes

6.4 Sustainability

6.5 Overall conclusions, including:

- Successes
- Learning
- Recommendations

Appendices

- a
- b
- c
- etc