



## RESEARCH AND EVALUATION NETWORK

10.02.15 at London Funders

### Participants

Craig	<b>Tomlinson</b>	BBC Children in Need
Oliver Sian	<b>Davis</b>	Big Lottery Fund
Marcus	<b>Hulme</b>	Big Society Capital
Rohan	<b>Martyres</b>	CAN
Mary	<b>Locke</b>	Charity Bank
Peter	<b>Argall</b>	Comic Relief
Ashley	<b>Horsey</b>	Commonweal Housing
Lisa	<b>Charalambous</b>	London Borough of Camden
Cecilie	<b>Hestbaek</b>	New Philanthropy Capital
Angela	<b>Kail</b>	New Philanthropy Capital
Nicola	<b>Bristow</b>	Oak Philanthropy (UK) Limited
Kirsty	<b>Gillan-Thomas</b>	Paul Hamlyn Foundation
Premila	<b>Gilligan</b>	Peabody
Emma	<b>Heel</b>	Sported
Chris	<b>Wignall</b>	Sported
Yemi	<b>Apampa</b>	The Social Innovation Partnership
Carol	<b>Reid</b>	Youth Music
Nick	<b>Wilsdon</b>	Youth Music
Noah	<b>Cantor</b>	ZING

### In attendance

Becky	<b>Green</b>	London Funders
David	<b>Warner</b>	London Funders

**Notes of the previous meeting** on 4 December 2014 were accepted as an accurate record.

Craig welcomed everyone to the meeting, reflected on the previous meeting and introduced this session as a good opportunity for reflection.

### Evaluation for strategic learning

**Ben Cairns, IVAR (Institute for Voluntary Action Research)**

[Ben's slides are available here](#)

Ben Cairns presented a workshop on the integration of evaluative information (including reporting and monitoring, knowledge management and organisational learning) into funding organisations to inform decision making. The principles and practices of strategic learning formed the focus of the inaugural gathering of the UK Evaluation Roundtable in March 2014, and Ben used this session to re-emphasise the learning points and discussion from that event. This included highlighting the necessary tools, systems and culture to embed strategic learning effectively.



Ben began by looking at a definition of the term ‘evaluation’ and commenting that evaluation is not just about results, but also about explaining *why*. This may be inward facing, looking at data you already have, or outward facing and asking new questions. Organisations vary as to whether it needs to think and reflect or look at more strategic learning. Some organisations, with very explicit strategies are well placed to use very strategic learning, whereas others have a lot of external pressure to demonstrate impact and so impact assessment is more necessary.

The roundtable and its key findings

Ben outlined three main types of evaluation uses:

Accountability	Demonstrating impact	Strategic Learning
<p>Monitoring whether efforts are doing what they said they would do and that resources are being managed well.</p> <p>Used to:</p> <ul style="list-style-type: none"> <li>Track whether plans are being implemented in accordance with grant agreements.</li> <li>Track actual against planned expenditure.</li> </ul>	<p>Determining whether a plausible and defensible case can be made that an effort contributed to observed results.</p> <p>Used to:</p> <ul style="list-style-type: none"> <li>Understand impact as individual funder.</li> <li>Demonstrate to other stakeholders how funding has made a difference.</li> </ul> <p>Appears to be most important to funders engaged in strategic philanthropy, programmatic funding or with public stakeholders/living donors.</p>	<p>Using evaluation to help organisations or groups learn in real-time and adapt their strategies to the changing circumstances around them.</p> <p>Used to:</p> <ul style="list-style-type: none"> <li>Develop greater expertise or knowledge in particular areas, e.g. where involvement will be effective or to find an appropriate niche.</li> <li>Test out a theory of change.</li> <li>Inform future strategy and build on what has gone before.</li> <li>Improve grantmaking decisions based on understanding what does and does not work (e.g. when funding new ideas/pilots).</li> <li>Enable a relaxed approach to risk/failure: ‘If we don’t have some failures, we’re not doing our job properly’.</li> </ul>

**There are challenges around the use of each of these;** Ben noted that different types of grantmaking generally call for different approaches, and are also influenced by where an initiative is in its development.

- Some types of grantmaking use models and are a lot more structured, with a pre-determined set of activities which can be expected to produce a predictable set out outcomes over time. This will lend itself more easily to impact evaluation. Adaptive initiatives however mean that dynamic conditions and multiple factors require adaptation along the way so the pathway and the outcomes may change over time. This would require strategic learning. [dynamic conditions require adaptation and a theory of change may be useful here as an emphasis of assumptions]



- Not all organisations are the same and will have the same approach - pluralism benefits civil society.
- The design of the evaluation is very important. Without an effective design it will likely lead to problems with delivery and a frustrating outcome.
- Structuring yourself internally to act on the evaluation is very difficult. Governance can often be at odds with a learning approach and trustees can have quite a closed approach. The staff level can be quite reflective, but difficult to penetrate the board room. Learning should have a seat at the strategy table however trustee capacity and interest can be a problem.

Both **engaging trustees** and the **evaluation design** are very important. While it can be difficult to engage trustees in strategic learning and the culture has to be receptive, part of the evaluators role is not just to collect data but to feedback actionable data and how it fits with the strategy.

All three of the following are critical to successful strategic learning

- 1) Asking the right questions and getting the right data
- 2) Structuring the work to enable regular use of data
- 3) Effectively processing and using the data

Ben reflected on the roundtable and noted that some challenges do seem very entrenched with very familiar problems, however noted some examples of where some organisations have made positive steps. Attendees reflected on where their organisations were within the journey and made some comments and questions:

- Commonweal Housing reflected that action learning is very important and that this is something that they are able to do well, learning from the successes and failures of projects in a very open way.
- The group discussed the possibilities of an annual learning day with trustees, to increase trustee engagement with evaluation and learning. Ben did note though that it would be best for evaluation to be a part of all discussions during all meetings and conversations.
- Some organisations struggle to influence the decision makers, however are able to illuminate the link back to the learning at each stage and may be able to achieve some small incremental subtle steps.
- Youth Music reflected on their journey, from the employment of a R&E team in 2009 to embedding the outcomes approach within the grants teams. Youth Music are now looking for a freelance R&E advisor to be a critical friend and provide support with business planning.
- Paul Hamlyn provided an update on their research on their own processes and research and evaluation journey.

Craig noted the requirement for openness and space. It can take a long time to get good evidence and trustees should be informed on the depth of insight even if they are not expected to make a decision on it, as this can help to influence the culture.