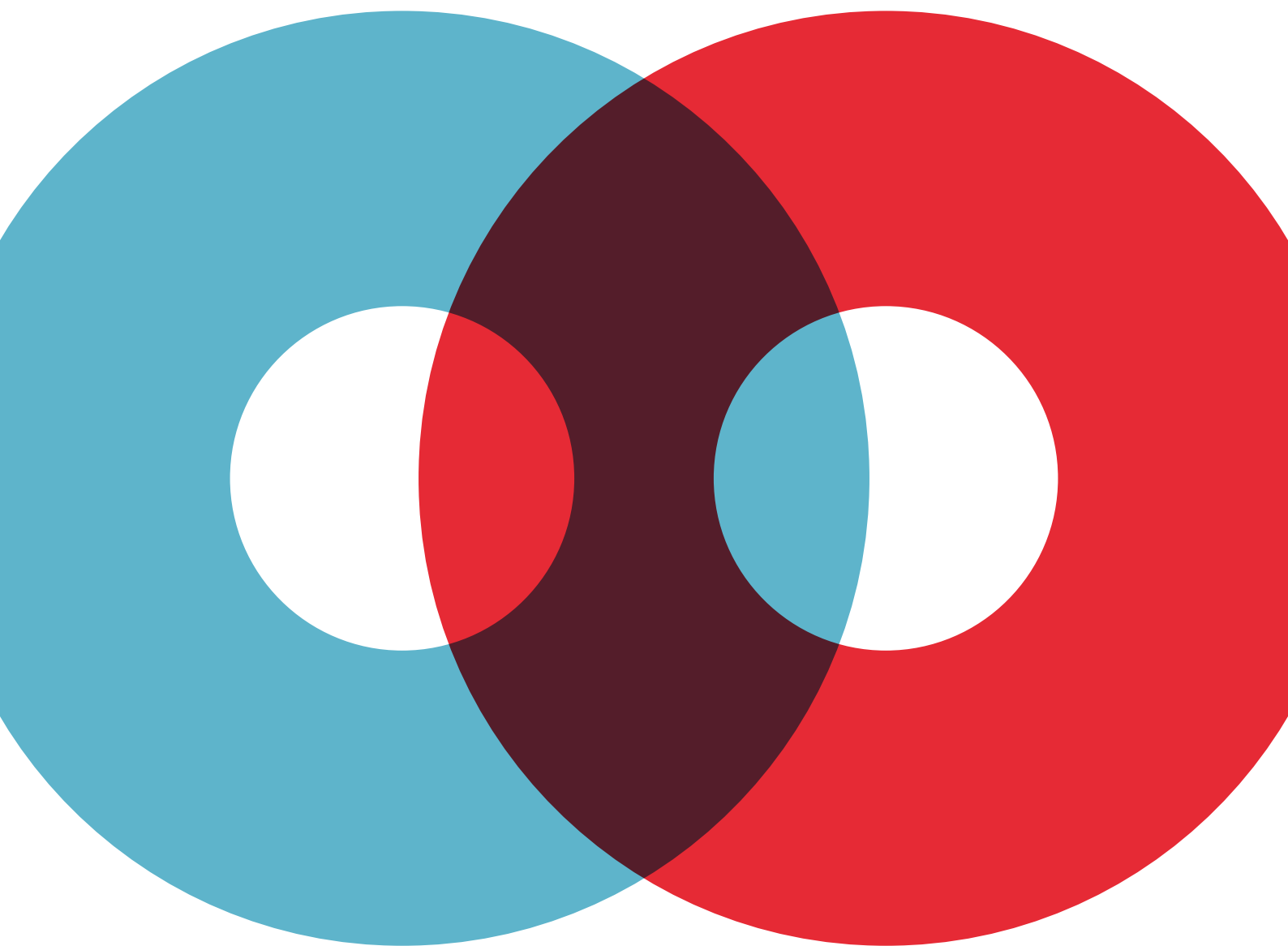


# UK Evaluation Roundtable

MAY 2019

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**FOLLOW-UP REPORT  
FROM JANUARY 2019 CONVENING**



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# Setting the scene

The Evaluation Roundtable is a partnership between IVAR<sup>1</sup> (Institute for Voluntary Action Research) and the Center for Evaluation Innovation<sup>2</sup> in Washington DC. The Roundtable offers the senior staff of independent trusts and foundations an opportunity to gather and reflect on the design, development and use of different approaches to evaluation and learning. In the UK, 60 foundations are members of the Roundtable network.

The Roundtable convening takes place every 18 months. It begins with the exploration of a 'teaching case', which this year told two stories - of how Corra Foundation and Pears Foundation conceive of, organise and carry out 'learning', in line with the convening's theme of 'Making Learning Everyday'. This is the core of Roundtable convenings: unpicking decisions in the teaching case to understand their implications for learning and practice development.

The selection of this theme, 'Making Learning Everyday', has its roots in the inaugural convening of the UK Evaluation Roundtable, held in 2014, where our focus was on how to maximise the use of evaluation by trusts and foundations for reflection and learning.<sup>3</sup> To support this, we introduced the concept of 'strategic learning'.<sup>4</sup> Of particular interest to UK foundations taking part were a number of strategic learning principles, most notably:

- Evaluation is a support for strategy
- Evaluation is integrated and conducted in partnership
- Evaluation emphasises context
- Evaluation is client-focused
- Evaluation places a high value on use, and helps to support it
- Evaluation data to inform strategy can come from a wide variety of sources and methods
- Evaluation must take place within a culture that encourages risk taking, learning, and adaptation
- Evaluation is flexible and timely, and ready for the unexpected

Following the 2014 convening, we concluded that:

*'Learning activity in foundations generally has at least one of three intended uses: to promote accountability, identify impact or support strategic learning. These three uses are distinct but related and can be difficult to manage simultaneously. Furthermore, the operating environment for foundations and the organisations that they collaborate with and fund continues to be characterised by complexity and change. Complex situations challenge traditional practices. This places a premium on imagination, collaboration, patience and, above all, a willingness to invest in learning and to see it as integral to both the strategy and the actions of grant makers.'*

<sup>1</sup> [www.ivar.org.uk](http://www.ivar.org.uk)

<sup>2</sup> [www.evaluationinnovation.org](http://www.evaluationinnovation.org)

<sup>3</sup> IVAR (2014) *UK Evaluation Roundtable Framing Paper*, London: IVAR

<sup>4</sup> Strategic learning means using evaluation to help organizations or groups learn quickly from their work so they can learn from and adapt their strategies. It means integrating evaluation and evaluative thinking into strategic decision-making and bringing timely data to the table for reflection and use. It means making evaluation a part of the intervention - embedding it so that it influences the process. (Coffman, J. and Beer, T. (2011) *Evaluation to Support Strategic Learning: Principles and Practices*, Washington DC: CEI)

Later, at the third Roundtable convening held in May 2017, the teaching case explored the question of learning in responsive grant-making.<sup>5</sup> This was accompanied by a survey of Roundtable members, out of which we jointly developed a description of a learning organisation:

*'A learning organisation actively creates spaces and opportunities for knowledge and intelligence to inform and shape its day-to-day practices, as well as its future direction, and embeds these within its culture ... A learning organisation is one where evaluation, as an activity or practice – encompassing a broad range of activities – forms part of a much wider, reflective process'.*

While our findings covered just a small portion of UK foundations, they indicated a number of stress points and opportunities for innovation around learning practices. Although respondents acknowledged that, in contrast to their grantees, *'we live in a world of little pressure, no performance management and no hard consequences'*, some were finding it difficult to balance operational needs

with providing space and time for reflection. This emerged as the most significant factor inhibiting learning: *'dominant funding practices ... have prioritised 'proving' impact and competition between organisations which disincentives useful, honest learning and collaboration'*. There was an ambition to hear more from grantees, through providing opportunities to reflect on 'lessons learnt', to meet with staff and to attend external learning events. Most felt they either *'match the Roundtable description'* of a learning organisation,<sup>1</sup> or are *'taking active steps to becoming this type of organisation'*. However, around a third described themselves as *'aspiring to be a learning organisation but struggling with how to put this into practice'*. This led us to our 2019 theme of 'Making Learning Everyday' and our focus on making concrete and visible what specific practices we're aspiring to and how the work might look if those were actually embedded.

<sup>5</sup> IVAR (2017) UK Evaluation Roundtable Teaching Case: Esmée Fairbairn Foundation: Learning in responsive grant-making, London: IVAR

# Key messages about Making Learning Everyday from the January 2019 convening

## Headlines from the literature

At each successive Roundtable convening we have peeled the onion on learning a little further. Through each dialogue, Roundtable participants have challenged one another to think more deeply and concretely about how grantmakers can engage in learning.

## Why do we care about learning?

Organisational learning is a process which unfolds over time as a result of organisational attitudes, commitments and management processes. Ultimately, if done well, insights from learning activities materialise in changes in practice and behaviour and improved outcomes.

Specific benefits highlighted in the literature include:

- Greater flexibility and responsiveness to support organisations coping with inevitable internal and external change.
- Stronger working relationships and connections between colleagues and with partners.
- More democratic organisational structures, where power is distributed and individuals – including grantees and, where possible, beneficiaries – are empowered and encouraged to work together and participate in decision-making.

- Increased time and space for reflection to support collaboration, creativity and experimentation.
- Better information flows which disseminate good practice and new ideas throughout an organisation and across networks.

## What are the challenges we've identified?

Alongside the expected benefits of learning, the literature points to a number of challenges for organisations, including:

- Implementation can be complicated and demands significant commitment, resources and time.
- Innovations which result from organisational learning may break organisational rules.
- It can be difficult to shift dominant organisational culture and its subcultures: these strongly influence the nature of learning and the way learning occurs or does not occur in organisations.
- Leaders may be reluctant to give staff a voice, fearing they may lose control over outcomes.
- Staff may not want to take part in decision-making processes as they may be distrustful, disengaged or just overburdened with other responsibilities.

Other challenges specific to philanthropy include:

- Working with resource-poor funded organisations that struggle to find the time and money to collect meaningful data, reflect, and do what is needed to change their approach.
- Competing demands faced by funded organisations from different funders who want them to collect different kinds of data, explore different evaluative questions, or test different approaches.
- ‘Learning fatigue’ amongst funded organisations, caused by being asked to participate in many different group-learning processes by many different funders.
- Grantee/grant maker power dynamics and incentives to look always like a high performer because of competition for money against other organisations.
- Lack of evaluation capacity and expertise in funded organisations.

## What does it take?

### i. Culture

A foundation’s culture is central to establishing an environment conducive to learning both inside and outside an organisation.

Culture *‘involves the articulation and consistent, long-term promotion of the values, norms, and daily behaviors that allow people, organizations, and communities to align their actions in a disciplined way that contributes to progress’*<sup>6</sup>.

Collaboration and partnership; commitment to diversity, equality and inclusion; respect and humility; responsiveness; transparency and trust; and curiosity are important attributes which support a learning culture within and between organisations.

### ii. Leadership

Leaders play a key role in establishing cultures which support or hinder learning. Leadership styles that show a sincere commitment to learning and adaptation are more likely to create a learning culture. Funders who model adaptive behaviour, who are candid about how their thinking may have changed and why, or are clear about their own uncertainty, are more likely to elicit a degree of candour and reflection from funded organisations.

### iii. Learning processes

Learning processes and practices build reflection and sense-making, either in a regular cycle or in response to particular windows of opportunity or crises. Capturing, using and sharing learning requires a range of systems and processes often referred to as ‘knowledge management’, which involves ‘knowledge acquisition, creation, refinement, storage, transfer, sharing, and utilization’<sup>7</sup>. This is a rapidly evolving area and many organisations are now using social media or building more user-controlled platforms, that bring with them even greater organisational transparency and give rise to more diverse perspectives in the organisational conversation.

## The Roundtable teaching cases

For the 2019 convening, we collaborated with two foundations – Corra Foundation and Pears Foundation – to produce two short case studies of their distinct approaches to ‘Making Learning Everyday’, both written by Liz Firth. These two foundations share much in common – they both belong to a tradition of grant-making that is increasingly described as ‘relational’. **Questions about power and behaviour and contribution are carefully and sensitively considered at all levels of their organisations.**

<sup>6</sup> Celep, Amy; Brenner, Sara; and Mosher-Williams, Rachel (2016) ‘Internal Culture, External Impact: How a Change-Making Culture Positions Foundations to Achieve Transformational Change,’ *The Foundation Review*: Vol. 8: Iss. 1, Article 12.

<sup>7</sup> W.R. King (ed.), *Knowledge Management and Organizational Learning*, *Annals of Information Systems* 4, DOI 10.1007/978-1-4419-0011-1\_1, Springer Science+Business Media, LLC 2009  
10 <https://medium.com/@jcoffman/5-a-day-learning-by-force-of-habit-6c890260acbf>

However, their approaches to learning are markedly different. These differences helpfully give rise to a set of questions that resonate across all foundations interested in understanding and improving learning practices:

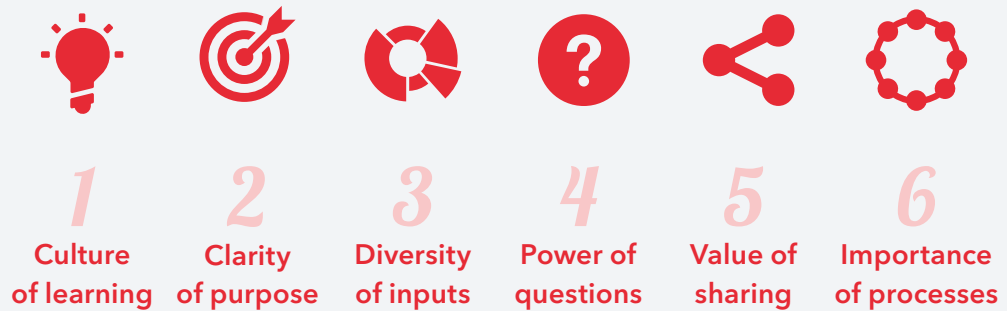
- What does effective learning make possible (and for whom) that wouldn't be possible otherwise?
- What routine behaviours characterise high quality team learning practices?
- What signals tell us that our learning practices are adding value to our work?
- What kinds of inputs (e.g. systematically collected data or evidence) are critical for high quality learning?
- How should we focus and prioritise where systematic inputs will add the most value?
- What incentives, both formal and informal, help or hinder learning and the use of data and evidence?
- How might the development of a routine learning practice differ in different organisational contexts?
- What does it actually take to embed learning into the way we work?

## Principles for high quality learning organisations

Over the course of the convening we explored these questions around what it means to be a learning organisation. We heard a powerful message about the need to improve the organisation and resourcing of learning:

- Establish a culture of learning, modelled and led by the Board but owned by everyone. This should be iterative, adaptive and flexible with learning genuinely driven by what grantees want.
- The skills and behaviour required for this may include: maintaining confidence in the face of constant reflection; building skills and understanding learning styles; recognising that learning is everywhere: the job is to stop, reflect and use it; understanding that learning must be proportionate, important and useful: constantly check back 'to what end?'; stop things that aren't working.
- Sources of information from which to learn may include: the 'business of grant-making'; conversations with or visits to grantees; management information; commissioned research; convening grantees or other stakeholders; and through blogs, websites, publications and social media. The key is how and when to digest information so that it becomes intelligence.
- Resource trustee time to prioritise learning, possibly through reallocating time away from up-front grant decisions.

Through our discussions, we developed and tested a set of six ‘propositions’ or principles about what distinguishes the practice of high quality learning organisations.



### 1. Culture of learning

Organisations require a culture that values and models:

- Open, active listening to different perspectives – internal and external.
- Humility with respect to what you don’t know (and the limitations to what you can know).
- *‘Intentional exposure to unexpected challenge and plenty of nap time’.*
- Encouragement for learning that may at first appear unrelated.
- Space and permission for everyone within an organisation to reflect and learn (individually and collectively).
- Awareness and appreciation of a range of learning styles.
- Visibly looping learning to action in both practice and strategy/approach.

### 2. Clarity of purpose

- Start with clarity of purpose of the ‘learning agenda’ – in particular, clarity about what we want to learn, why and to what end.
- Then ensure alignment between learning activities and purpose of learning, never losing sight of the important question of why you want to learn.

- Be open throughout the organisation about purpose: *‘declared and shared intentionality around what you want to learn and for what purpose’.*

### 3. Diversity of inputs

- Remain conscious and aware of what you might not know – in part by actively bringing in other evidence/ different sources of information into your deliberations – with an emphasis on self-monitoring and being acutely aware of ‘blind spots’.

### 4. Power of questions

- Asking questions sits at the heart of learning. This begins with an organisational culture that encourages *‘questions to be asked, debated and candidly answered’.*
- It also requires thinking carefully what the right question is and trying to *‘ask better questions to move from observations to genuine learning, getting beyond general descriptions and under the skin of why’.*
- And it requires paying attention not only to the ‘what’, but also to the ‘so what’ and the ‘now what’.





## 5. Value of sharing

- For learning to be useful and usable, it needs to be shared: *‘people will volunteer learning if they know it will be used’*.
- This requires you to be clear about what you - and others - want to learn in order both to make learning reciprocal - *‘make your thinking fully visible to one another and invite in alternative perspectives that push your thinking’* - and to be transparent and precise about use.



## 6. Importance of processes

- Systematic processes to bring attention to learning, including making time and space for it to happen, are critical. These need to be a fusion of informal learning with appropriate formal learning structures.
- To ensure coherence, learning needs to be built into planning and decision-making cycles.
- And to support buy-in, examples of learning - questioning and active listening that have led to changes - across teams, levels, boards, up and down and across an organisation - need to be gathered and promoted: *‘the message needs to be that learning is work and learning works’*, and processes are required to ensure it happens.

# Closing reflections and feedback

Our attendees from Pears Foundation and Corra Foundation offered characteristically thoughtful closing reflections at the end of the convening, and they have been kind enough to agree for us to publish them here.

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## Pears Foundation, Bridget McGing

It says in the case we like to seek out different and external sources of information - and today has been a great example. Sharing our approach has been a privilege and has stimulated a lot of thoughts. From today's discussion and preparing the case, I have thought a lot about the idea of relational grant-making and suggestions that this is the 'next trend', following on the heels of place-based funding.

Given our sector's tendency to pendulum swing from one trend to another, I would like to sound a note of caution from the vantage point of a foundation that does a lot of relational grant-making: there isn't one simple answer. Everything we do is through relationships, but there is also accountability, triangulation, due diligence and accounts. Relationships support all of that, but things still need to be interrogated, sense-checked, and for us this is done very intentionally.

Yes, relationships have filters, prejudices, biases - but so do all grant decisions. The best you can do is bring your experience, knowledge and sensitivity to the process.

Relational grant-making isn't for every trust or foundation. Your grant managers may be hugely skilled, but if there isn't trust from senior leadership and boards in grant-managers then you really have to ask yourself if it's the right format for you. Long-term, this applies as much to grantees as it does to staff: trusted relationships with grantees take time to build.

I'm very struck by the comparison between Pears and Corra foundations. We both intentionally set aside time for learning with and for our grantees - but when offered in a non-mandatory form this is often not taken up, whatever the incentive. Sometimes you have to take a stick, paint it orange and pretend it's a carrot!

At the start of the day, we were asked to think of a five-year goal or aspiration, and we were all surprised at what we felt: a mix of warmth at the idea of reaching our imagined milestones, and fear that we wouldn't achieve them. When we don't achieve something, we learn from the experience - and a great bit of learning can be really satisfying! So we need to inject joy and enjoyment into learning.

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## Corra Foundation, Elaine Wilson

I'd like to start by thanking Liz Firth for the questions she posed that helped to shape our teaching case. Her first question to us was 'what is learning?' - it's everything and nothing, it has to be meaningful. We recognise that it's not that stuff that gathers dust on the shelf. How do we continue to think about what learning is, and about how we use it internally and externally? How do we try and make it not feel mandatory?

When my post - Head of Learning and Development - was created, I had to make the staff team feel that the data and insights they have is learning, which is often harder than it seems. We had to take things bit by bit. Take the time to read and acknowledge learning, to make people feel connected and valued - and we need continually to make time to do that.

We want the time and space for reflection, but once a learning system is in place this is often the last thing on your mind - how do you make learning feel continually meaningful? It's a long journey, but we've made a lot of progress. And learning is one part of a bigger picture - a logic model that sits alongside other things. We have KPIs that are very internal, and trustees have been clear that they don't want to measure us against the numbers, but rather reflect on them: have we selected the right measures? Do we need to change them? Do they reflect what we are trying to achieve as an organisation? They are asking why, not what.

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## Corra Foundation, Carolyn Sawers

There are three lessons that I feel we should action from the conversation today:

**1. Learning is about understanding, and making meaning.** So you need to keep going until you do understand. I'm struck by how complex the areas of social change we are all working in are - we need to keep going until we understand the context we are operating in. That requires investment in skills and capability and analysis - as much investment as we put into systems and data.

**2. A change mindset.** This is unexpressed at the moment in our organisation as a condition for success, and we might benefit from surfacing that more. We need to pay more attention to people's motivations.

**3. Learning feels challenging.** It is rare that learning or change doesn't fundamentally challenge your sense of certainty or sense of value/organisational value. I'd like to reflect after today, and in particular after hearing the Pears case, on our commitment - as an employer, a partner and a funder - to our learning and the support we offer others to learn.

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Center for Evaluation Innovation, Tanya Beer

Institute for Voluntary Action Research, Ben Cairns

The field has come a long way over the period that we have been trying to think about it in a very concerted, reflective way. An overarching message back in 2014 was that learning and evaluation were struggling for air time. There were real questions then around the status of learning and learners - in particular, people felt frustrated about the lack of attention boards paid to it.

Keeping going is terribly important. We have kept going to some positive benefit. Five years on, we are in a different place. The last roundtable theme was 'what it means to be a learning organisation' - and we've now drilled down into questions of practice. Making learning everyday is not a contested concept but the practice of learning really needs to be grappled with.

It's called a learning practice for a reason. It's an action, not a thing; and it needs to be rehearsed, practised again and again - a noun, a thing that gets passed around. How we make learning, how we do it, matters. And we all need to learn our way into learning. It's the kind of thing where you need to give yourselves space to experiment, try things, see what doesn't work - drop it - take what works and move that further, as you cultivate your learning muscle. Sometimes people feel exhausted by the expanse of what they're trying to do. Which is why it's so important to give yourself the space to be learners as you go.

# Your feedback from the event

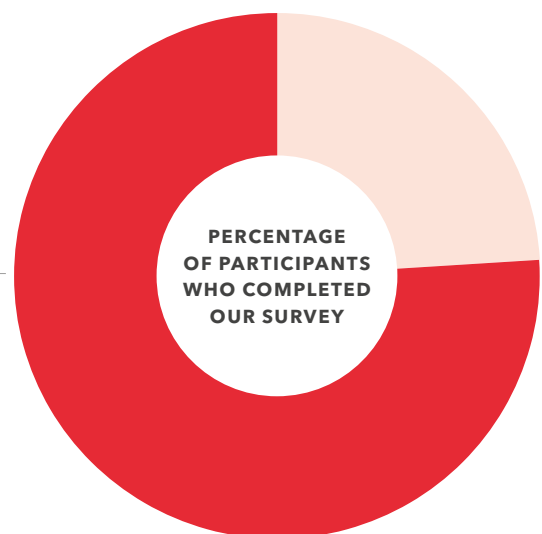
The fourth convening of the UK Evaluation Roundtable took place on 31 January 2019, and was attended by 42 people from 30 UK trusts and foundations. Participants included trustees, CEOs, Directors, Heads of Research (or Learning/Knowledge/Evaluation/Impact) and Grant Managers with responsibilities for evaluation and learning.

Following the convening, we carried out an online, anonymous survey to seek feedback about the content, format and outcomes of the event, as well as participants' appetite for potential follow-up activities. The feedback survey was completed by 32 people (76% of participants). 13% of those who responded were attending the Roundtable for the first time. 19% had attended the inaugural convening held in March 2014, 26% had attended the convening in September 2015 and 29% had attended the convening in May 2017.

IVAR is very grateful to those who took time to complete this feedback survey, and for all your comments and suggestions. Gathering this feedback helps to ensure that:

- The Evaluation Roundtable continues to be as relevant and useful as possible to its intended audience.
- Future events are designed and delivered to meet the needs of its audience.
- The Evaluation Roundtable continues to be a joint endeavour between IVAR, Center for Evaluation Innovation and UK trusts and foundations.

76%



## Summary and reflections

Overall, respondents were very positive about the Roundtable convening. In particular: the two teaching cases; Ian Robertson's opening talk on 'The Learning Brain'; opportunities for peer learning; the formal and informal networking opportunities; the overall administration and planning; the mix of expertise and seniority in the room and the expert facilitation.

The case studies were a consistent highlight, especially the *'depth we went into and acknowledgment of the emotions at play'*.

The length of the day and full agenda left some feeling there was *'perhaps too much to pack in'*. Others would have welcomed *'more time to discuss the case study challenges and choices'* and *'more rotation in the groups'*. These are all things that we will reflect on as we begin to plan the next convening.

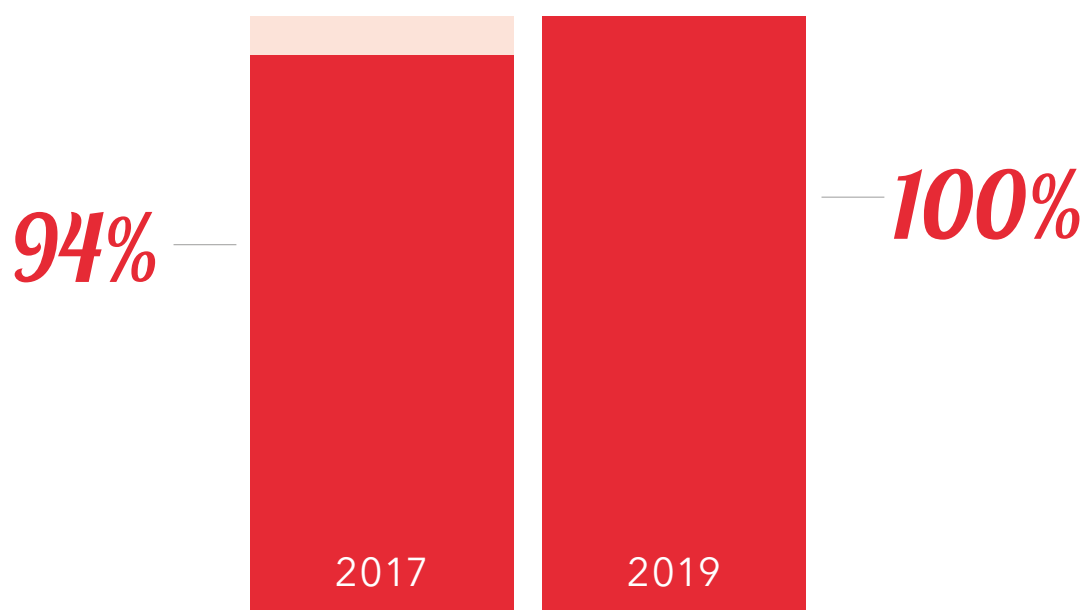
Some also mentioned they thought a two-day model, as has been used

in the past, might work better as the sessions could then be shorter and it was less likely that people would leave early. In addition, satisfaction with 'Opportunities for interaction with peers' fell from 69% in 2017 to 56% in 2019. **We have therefore decided to organise the next Evaluation Roundtable as an overnight event in Edinburgh in the autumn of 2020.**

Very positively, 60% of respondents said they would attend an overnight residential in Edinburgh (with a further 31% answering 'not sure').

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**PERCENTAGE OF PARTICIPANTS WHO SAID THEY WERE 'SATISFIED' OR 'VERY SATISFIED' WITH THE OVERALL EVENT-**



## The overall event

Respondents were positive about the fourth convening of the Roundtable. 100% were 'satisfied' or 'very satisfied' with the overall event – an increase from last year. Amongst the highest levels of satisfaction were with the overall administration and Ian Robertson's opening talk.

“

*This was one of the most engaging and professionally facilitated roundtables I have participated in, in a long time'*

“

*The roundtable was very well prepared and organised'*

We also asked about venue, catering and access to new ideas. Some people felt that the shape and layout of the room perhaps hampered discussion, given the number of attendees.

## Introduction to the two case studies and part one

The morning of the event introduced the two case studies from Corra Foundation and Pears Foundation. A task was then set to consider the questions 'What routine behaviours characterise high quality team learning practices?' and 'What signals tell us that our learning practices are adding value to our work?' The response to both of these sessions was very positive – 96% were 'very satisfied' or 'satisfied' with the introduction and 88% responded similarly to part one:

“

*The format of the day kept things light but highly stimulating and productive. Very good use of time'*

A small number of respondents offered suggestion for improving the morning sessions:

“

*I would have liked to get into the case studies in a bit more depth. I liked the previous Roundtable when we worked together to find solutions/ options to tricky questions/ scenarios'*

## Part two

After lunch, groups were asked the question 'what types of inputs into learning add real value?' This session was rated slightly lower than part one, with 87% responding they were 'satisfied' or 'very satisfied'.

“

*The group conversations were ok but quite long. I'd make them shorter and more structured – maybe a chair to keep conversation focused'*

## Part three

Using a set of core principles and behaviours generated in part one, attendees were asked to consider 'what incentives help or hinder learning and the use of data?'. Whilst receiving positive feedback, this session was rated the least popular of the day, with 68% responding they were 'very satisfied' or 'satisfied'.

“

*The most useful thing for me was having the 'core principles' we had generated in the morning typed up and then used in the afternoon'*

“

*I only rated the last session a little lower because my energy was starting to sap a bit'*

## What did respondents particularly like about the Roundtable?

Respondents were asked to identify up to two things that they particularly liked about the Roundtable. Analysing their comments, we can identify five 'highlights' of the 2019 convening:

- **Facilitation:** *'It was quite a 'teaching' style that I respond to well and suits the way I learn, but don't get to experience all that often at work'.*
- **Networking opportunity:** *'I valued the time given to structured networking and table discussions. This sort of time is rarely available in the grant-making world and it was valuable to make space for learning'.*
- **The case studies:** *'I thought the overview and case study materials were excellent, really top quality, and the sort of thing I can go back to over time'.*
- **The mix of people:** *'What an exceptional group you got together, that really is a resource in itself'.*
- **Atmosphere:** *'The energy in the room was good and the conversation was open to different ideas and opinions (thankfully, given this is a learning space)'.*

## What would respondents change about the Roundtable?

The suggested changes can be grouped into three broad categories:

- **Link between the opening talk and the rest of the day:** *'The opening talk was undoubtedly fascinating but we didn't seem to carry it through fully - there was real interest in the personal/psychological content but then we switched quite quickly to organisational practices'.*
- **Case studies:** *'I felt that that we didn't get quite enough chance to dive into the details of either of the teaching cases but brushed the surface of both'.*
- **Length of the day:** *'It felt like a brain-melting day (in a good way), but if you can think of a way to create a pause, rest of brain and then back to it, or a change in dynamic or energy, then I would have got even more from it'.*



# Next steps

Organisational learning can be particularly challenging for foundations as their boundaries are porous, meaning their learning is, in part, dependent on that of their 'funded partners' (i.e. grantees). These may be resource-poor organisations who struggle to find the time, money and expertise to collect meaningful data and reflect; and who are often faced with multiple and competing demands from different funders who want to collect different types of data, explore different evaluative questions, or test different approaches. Grantee/grant maker power dynamics and incentives to look always like a high performer in a competitive funding environment also affect the ability and willingness to generate and share learning.

As strategy within foundations becomes more dynamic, collaborative and decentralised, it has become important to recognise that learning is 'real work' and part of strategy, rather than an optional add-on that occurs in addition to strategy: learning and adaptation are an essential part of grant-making. Some foundations feel constrained by the way data and learning are perceived in their organisation as both linear and static: there is a need to use learning in real time and remain flexible about how data is drawn on and used to support a more dynamic process. While developing systems and structures to support learning are

critical, an over-focus on structure and systems risks limiting this flexibility. So, careful attention is required on how to structure the work, the relationships, and the informal and formal incentives in such a way that they support this kind of flexible dialogue and adaptation. It also requires rethinking who needs to learn, as well as on what evaluation and learning should focus.

However, while there is more emphasis on learning across the sector, few foundations have clear theories or strategies on what they are doing to support it effectively. Because 'learning' can mean anything and everything, it risks meaning nothing at all. By being more deliberate with our learning work, we hope to avoid having the sector's current interest in learning go the way of other fads.

Rigorous learning is not a technical problem solved by simply having the right tool, the right template, or even the right data and findings at hand. It is a practice, an everyday way of working and thinking. We can support learning by building a set of habits. Focusing on habits ensures that learning is not a separate activity or just another step in a process. It makes learning an integral part of the way we work. And it helps to make concrete and visible what specific practices we're looking for and how the work might look if those were actually embedded.

To support further improvements in this area, and building directly on the conversations at the January 2019 convening and the ideas put forward in the feedback survey, we are prioritising five actions.

1

### **A community of practice**

**91% of those who responded to the feedback survey said that 'a community of practice or peer-to-peer sharing, learning and problem solving' would be useful.**

The first community of practice meeting will take place on 3 October 2019 at CCLA, between 15.00-17.30 followed by drinks. We will be convening individuals who lead on learning, evaluation or monitoring and impact to share and support each other with the particular challenges of holding responsibility for organisational learning.

To book a place, please email Vanessa: [vanessa@ivar.org.uk](mailto:vanessa@ivar.org.uk)

2

### **Publication of Roundtable Teaching Cases**

We will be publishing the two 'Making Learning Everyday' teaching cases (Corra Foundation and Pears Foundation) in June. They will be accompanied by a summary of our teaching case notes which will act as 'suggestions for use' to encourage foundation staff to explore their own practices.

3

### **Invitation only workshop and lunch for Chairs and CEOs**

This will take place on 20 November 2019 at CCLA and will bring together UK Trust and Foundation Chairs and Chief Executives to explore the Pears

and Corra Foundation Teaching Cases and consider what it means to lead a learning organisation and 'make learning everyday'.

4

### **Letters from America**

We are developing a quarterly 'Letters from America' blog series with the Center for Evaluation Innovation that will share leading edge thinking from the US Evaluation Roundtable network about the role, contribution and practices of independent funders. The first blog in September 2019 will look at building learning habits - thinking about learning as a way of working rather than a one-off event.

5

### **2020 convening**

**60% of those who responded to the feedback survey said that they would attend the next Roundtable convening in 2020 if it were held as an overnight residential in Edinburgh.**

We're therefore delighted to announce that the next Evaluation Roundtable will take place in September 2020 in Edinburgh. We'll be back in touch soon with the details.

There will be opportunities through the Community of Practice and the lunch for Chairs and CEOs to help shape the precise focus and format of the 2020 convening, so that it can be of direct relevance and benefit. In the new year we will be surveying members of the Roundtable network to better understand their learning practices.

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