More data is not the answer

Learning and evaluation in trusts and foundations during Covid-19

October 2020

Introduction

As local lockdowns continue and the government introduces further social distancing measures in the hope of curbing a surge in virus cases, it's clear the journey out of the Covid-19 crisis will not be a linear one. The pandemic has changed the funding world like nothing before it. As funders move beyond their immediate emergency responses, they are considering what they have learnt and how this should affect their priorities and plans as they look towards a future characterised by continued uncertainty.

Evaluation and learning staff have a critical role to play in helping their organisations to make informed decisions and hold onto new trust-based processes characterised by simplicity, delegation and flexibility. Many see a real moment of opportunity to embed lessons learnt and new ways of working established during this difficult time. But they are struggling to corral all the intelligence that has been gathered and to work out how best to bring it to bear to support both strategy and practice going forward.

Based on an approach we are using with VCSE organisations, IVAR is facilitating online sessions of the Evaluation Roundtable Community of Practice, open to all foundation staff leading on evaluation and learning. These are spaces where people can share challenges and dilemmas, and learn from each other's experiences in their efforts to put learning at the heart of foundations' evolving responses to Covid-19.

This briefing shares the experiences of the 20 staff participating in the third round of sessions during September 2020, and our reflections on the questions and opportunities for funders that they raise. These sessions saw a renewed focus on many familiar questions about effective learning – *"how can we create an environment where we hear what went badly not just what went well?"; "how can we judge the totality of our contribution not just one programme or intervention?"' "how can we keep learning at the heart of how we do things day-to-day?"* – and helpful debate on when, how and why these questions help learning and evaluation staff to bring value to the challenging decisions facing both funders and the VCSE organisations they support.

About the Evaluation Roundtable

Since 2014, IVAR has convened the UK Evaluation Roundtable – which offers independent trusts and foundations an opportunity to gather and reflect on the design, development and use of different approaches to evaluation and learning. It is supported by grants from Oak Foundation and Paul Hamlyn Foundation.

There is a convening every 18 months, in partnership with the Center for Evaluation Innovation who run the US Evaluation Roundtable. A smaller Community of Practice for foundation staff leading on evaluation and learning began meeting in October 2019.

We would like to thank CCLA, partners of the UK Evaluation Roundtable since its first convening in 2014.

If you are interested in joining, please email vanessa@ivar.org.uk

What learning questions matter most?

In an environment where significant strategic decisions have to be made in conditions of high uncertainty, one of the biggest challenges for evaluation and learning staff is finding the right questions to focus on.

Some are trying to get a grip of the bigger picture of their foundation's contribution, but can struggle to aggregate in a sufficiently meaningful way: *'The challenge is to make something more of counting the individual things. Covid has given us a bit more data on how we have supported the sector, and this is the first time I've got data on how our work affects people. But there is no real meaningful way of evidencing the difference we make'.* This is particularly challenging where foundations are determined to prove their individual impact. However, most now accept that complex social needs call for a more nuanced understanding: *'It is more insightful to understand the changes we've contributed to, because it won't be just because of us. We must acknowledge that we're only ever going to be contributing'.*

Others have made progress by focusing on narrower questions that are within their immediate control or influence. For some, this is all about *'how we fund and how we can do better'.* Or they concentrate on understanding the value they are adding against agreed social objectives: *'Clarity of objectives and clarity about our responsibility is the essential starting point – then the task is to work out how to judge yourself against your own objectives'.*

People find different tools useful in helping them to identify and test the questions that matter most to their foundations. Iterative hypotheses, theories of change, outcome harvesting, and logic models all have their supporters and detractors. But there was general agreement that it is not the specific tool or model that matters as much as the rigour that is brought to making a robust connection between a foundation's strategic aims and the work that it does day-to-day: *'We use our theory of change as an exercise to get us thinking in the right way, but we know it cannot contain the complexity of what we do'.* And, critically, it is about identifying the questions that will help the foundation to develop and improve its contribution: *'Not making the assumptions explicit is where people fall down. There is a lot of "what" and not enough "so what" and "now what"'.*

Learning and evaluation staff clearly feel the strain where *'what we most need to learn'* is not clear and agreed across their foundation. Some described their Boards as *'a blocker'* to any efforts to shift focus away from accountability to more forward-looking questions like *"how are we making a difference"* and *"how can we be more useful".* But the pandemic has disrupted business as usual, creating opportunities for some to shift established expectations and ways of doing things: *'Having trustees in early assessment meetings has made a difference'; 'We have been reformulating board papers and reframing committee meetings'; 'Trustees have delegated more funding decisions to the team and are focusing on the bigger picture'.* The hope is that, where boards have for the first time been ready to adopt more trust-based approaches during the crisis, they will remain open to different methods.

Summary

- Complex social needs call for a more nuanced understanding of impact, with the emphasis on contribution rather than attribution.
- Boards have been ready to adopt more trust-based approaches during the crisis: it's vital that they remain open to different methods.

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How much data is enough?

Moving from the challenges of the immediate emergency response and beginning to face difficult questions about focus and priorities in a highly uncertain future, evaluation and learning staff feel the pressure of making sense of all the information the crisis has generated to support decision-making.

Given the huge demands, especially on front-line services, timely analysis is proving more difficult: *'It has been harder getting data from grantees at the moment and internally making sense of that data is also a challenge'*. And learning has come in less orderly ways: *'Adopting Microsoft Teams has enabled sharing. It's become a messy library, but people take what's useful to them. There is a bigger conversation about whether we can usefully upload and store the information for analysis'*.

Some are troubled by the gaps in their own routine data created by deliberate – and very necessary – decisions to suspend or radically reduce reporting requirements, or make grants without agreeing specific outcomes or targets:

> *'We stopped asking for reporting (before payment). And we're pleased that we did that … We mustn't go back and ask for things we suspended, which would look insincere. But we do need to ensure the funding team have enough information.'*

And many are feeling the pressure to ask more questions and seek more data as their foundation moves towards firm plans for the future:

> *'Now is a kind of reckoning - how do we learn from this experience without overburdening the organisations we work with?'*

But strong arguments were made against *'sleepwalking into more and more requests for information as people – and Boards in particular – slip back into old roles and expectations'*. A huge amount of data, feedback and intelligence has been generated during the crisis: *'At one point everyone and their dog was doing a survey'*. The big challenge is not in gathering learning but in corralling it in such a way as to be useful to those charged with making the big decisions about 'what next'. Now, more than ever, *'the fundamental questions are "learning about what?" and "for what purpose?"'*

Summary

- Evaluation and learning staff feel the pressure of making sense of all the information the crisis has generated to support decision-making: timely analysis is difficult, and learning is less orderly.
- The big challenge remains use, rather than collection, of data.

How should we be learning?

Questions about participation in and leadership of the learning agenda – about whose voices are heard, about power dynamics, about who benefits – have been slowly filtering through foundation thinking over recent years. Some were active in this space before Covid:

> *'Our learning agenda is linked to our grant-making philosophy. We are collaborating with prospective grantees. We share learning before grant-making even takes place. This is a great way to get clarity and embed*

learning from the outset and it builds shared ownership of a learning agenda. It also creates a culture of mutuality, sharing and experimentation.'

And, in the face of massive social upheaval and prolonged periods of change, the instinct towards a more collaborative, open approach is strong in both VCSE organisations and funders. Indeed, many funders already play a valued convening role in their sectors and areas of interest. But some evaluation and learning staff would argue that more need to position themselves as full partners and participants:

> *'Foundations and foundation staff need to insert themselves into systems where people are processing learning and thinking about what next. We are not spectators. It's about learning with and alongside.'*

Funders are not passive onlookers. Not only do they make change possible, they are uniquely positioned with a vantage point across organisations, projects, programmes and sectors. Supporting and joining spaces where people can ask difficult questions is hugely valued and builds a *'sense of shared endeavour'* which people are keen to maintain and grow:

> *'Just describing an explosion of activity is not interesting ... this is just self-justification ... it's about collective processes that involve networks of conversations.'*

There is an increasingly strong sense that networks and collaborations are the optimum way to explore and respond to urgent, complex issues: *'We need to grab hold of these collective spaces to address today's pressing challenges such as diversity and equality, and climate change'.* Understanding how funders contribute to these issues will clearly be about *'asking: "how can we make a useful contribution?"', not "what is our impact?"'.*

Summary

- The instinct towards a more collaborative, open approach is currently strong in both VCSE organisations and funders.
- When funders support and join spaces where people can ask difficult questions, this is hugely valued and builds a sense of shared endeavour – this needs to be harnessed and built on to develop shared responses to urgent, complex issues.

Learning from lockdown – what we want to keep

Evaluation and learning staff shared reflections on the practices that they are hoping to keep and develop as we move into autumn and winter.

Better ways of working

Examples and experiences all reflected three interrelated themes – simplicity, trust, and connection:

- **Simplicity** and *'light-touch approaches'* to accountability and reporting: *'Covid has really forced us to look at how proportionate we are'.*
- **Delegating decision-making** to individuals and teams, especially for small grants, and ensuring decisions are quick: *'We were able to give grants outside of Board meetings for the first time'.*

- **Trusting organisations to do what they do best** and demonstrating this by *'moving to trust based systems'; 'we need to keep asking organisations what they need and not assuming we know better'.*
- **Being flexible** by providing more unrestricted funding and increasing flexibility within restricted grants.
- **Informal conversation and collaboration:** *'Getting to know people a bit more – possibly because we are all in our own homes – the boundaries have fallen away and this has really supported collaboration'.*

Breaking down the silos

Evaluation and learning staff also shared positive experiences that, despite the challenges of distancing and both personal and professional pressures, had advanced the cause of *'making learning everyday'* within their organisations. Aware that making space for learning needs to be intentional and consciously implemented, Covid-19 has inspired some to use simple mechanisms that are helping people to enjoy using learning in real time:

> *'Because things have been moving so fast, learning is being used immediately. We're trying to give opportunities for people to step back. Learning feels really useful to people, they are going into a meeting and using the learning the next day. This has been a very fruitful time for rapid realisation of change.'*

Instead of striving to create new processes, much has been achieved by making small tweaks to existing spaces or building on other habits:

> *'Making use of existing spaces is working well. We've established a reflective session at our committee meetings and repurposed our team meetings, which had been dreary affairs. We've have made them more interactive, getting people to think about how they are going to involve the team, swapping the chairing and making use of peoples' facilitation skills from previous jobs. Satisfaction is higher. We just need to close the loop.'*

And others have taken the opportunity to make more radical shifts, including significantly reducing the volume of operational updates in committee meetings or redirecting the focus of their Board:

> *'We've repurposed our Board Grants Committee into an Impact Committee which focuses on one of our four impact dimensions each quarter. We've also established intelligence days.'*

New ways of communicating

Many described the great richness they have found in the more informal contact and conversations they have had, particularly with grantees, and how much they hope to be able to sustain it. There is a stronger sense of collaboration, which is producing results:

> *'Covid has given sense of deep struggle and this has enabled us to skip straight to "how are things changing for you?". There is a foundation of commonality where deeper conversations can sit.'*

Some are concerned about how these conversations are captured and analysed, but others had confidently taken steps to integrate them into existing systems by, for example, using free text boxes in CRM systems with codes and tags linked to themes

to support sense-making and help to generate usable insights. Others were adopting a more relaxed approach:

> *'The act of having a conversation keeps trust going. And there are so many more conversations because it's quicker and easier. It's important not to get too stressed about recording everything.'*

Summary

- There is real appetite and enthusiasm for maintaining recent adaptations, in particular: simpler, more flexible processes; more delegation; greater trust and openness.
- Innovations to help use learning in real time are also widely valued.
- As is the shift to more informal conversations, both internally and with VCSE organisations.

Questions and opportunities

Since the beginning of this crisis, we have been [suggesting practical ways](#)[1] in which funders can support their grantees and the broader sector at this unprecedented time.

Our recent discussions with the Evaluation Roundtable Community of Practice have been a reminder that uncertainty and flexibility now are business as usual for everyone. The challenge is to respect this continuing instability, while facing up to the tough decisions that everyone is having to make. Over the next months, particular attention will be required in three areas:

1. **Clarity and focus**
   Begin with your purpose for collecting data and build from there – this will help you find the right things to look at. Interrogate assumptions and language (e.g. 'impact') until you understand each other and are fully aligned, all the way through your organisation. And avoid being ensnared by the idea that more data is the answer; instead, use what you have well.

2. **Be trusting – and trustworthy**
   Remaining true to the promises given during immediate emergency responses (e.g. around reporting) is critical, so it will be vital to resist the urge to *'fill the gap'* left by lighter reporting requirements. Keep the focus relentlessly on using empathy and instinct – alongside available data – to steer complex decisions: "what is going on in the world of the organisations that we fund, and how can we be as helpful as possible?" For now, that is enough.

3. **Keep learning and developing in a more agile and iterative way –**
   "This is what we know now" is as much as any of us can claim right now. But that hasn't prevented good things happening – through greater flexibility in behaviours and practices. The challenge now is to seize the opportunity for a more permanent shift.

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[1] We have drawn on conversations with VCSE organisations and with individual foundations across the UK, as well as on our past research and the actions already taken by many.

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Authorship and acknowledgements