Corra Foundation

1 ## Introduction

2 At the convening of the Evaluation Roundtable in January 2019, we considered how
3 two foundations – Corra Foundation and Pears Foundation – were working to 'make
4 learning everyday'.

5 The Foundations shared much in common, giving careful and sensitive
6 consideration to questions about power, behaviour and contribution
7 at all levels of their organisations. But their approaches to learning were markedly
8 different. At the convening, we used their experience and the choices they had
9 made to explore what it actually takes to embed learning into the way we work.

10 Eighteen months on, the environment has changed beyond our wildest imaginings.
11 People and systems are under stress in unprecedented ways. Facing a volatile
12 and uncertain future, foundations need good learning more than ever to support
13 tough decisions about maximising their contribution. In support of our discussion
14 at the 2020 convening, we asked Corra Foundation and Pears Foundation to share
15 how their approach to learning has performed under pressure and to give us their
16 initial thoughts on how this will influence the way they learn for the longer term.
17 This case considers the experience of Corra Foundation (Corra).

1 Who Corra was going into the pandemic

2 Mission and values

3 Corra's mission is 'to make a difference to people and communities by encouraging
4 positive change, opportunities, fairness and growth of aspirations, which improve
5 quality of life'. In 2019, it was in the last year of a strategic plan focused on
6 embedding the principles and organisational behaviours it saw as central to
7 pursuing this mission, characterised by getting alongside communities, working in
8 partnership, sharing expertise and 'being the best grant maker we can be'. Just
9 before lockdown, on 5th March 2020, Corra launched its new 10-year strategy to
10 help bring about three big changes, so that:

11 • The power to create change rests with people themselves
12 • People with ideas for radical change are supported, skilled,
13   connected and confident
14 • People are working together to respond to the big challenges
15   facing Scotland

16 Learning approach

17 Corra created the Head of Learning Development post early in 2017 to act as *'a
18 confluence ... to help us site learning, understand how to discuss it and act on it'.*
19 Her work crystallised around three learning priorities:

20 • How to improve the Foundation's effectiveness
21 • How learning can support *'the big existential questions'* about strategy
22   and mission
23 • How to create a culture where it feels safe and comfortable to offer and receive
24   questions and critique, within individual teams, across the organisation and in
25   external relationships

26 In all aspects of its learning, Corra is looking for a mix of evidence, drawn from
27 grant management information, formal reports, publications, academic research,
28 and a wide range of other sources. But informal intelligence, based on day-to-day
29 contact and simply talking to people, is particularly valued.

30 This strong organisational preference for relationships and conversation shaped the
31 Head of Learning Development's early focus. She worked concurrently on supporting
32 teams to have the tools and skills; testing new techniques for capturing learning
33 (such as weekly learning diaries); and supporting sharing of learning across the
34 Foundation. And, at the time of the 2019 convening, she was in the final stages of
35 a major project to review and relaunch Corra's Salesforce database. As well as
36 stripping out unnecessary data, the system created a light touch way of capturing
37 informal intelligence in two key areas – visits and conversations, and routine
38 reporting. The primary aim was to make this kind of data more capable of collective
39 analysis so that informal intelligence could become a more powerful and robust
40 part of Corra's learning, reporting and sharing with others.

How Corra has responded to Covid-19

Corra has been at the heart of the national emergency funding response to coronavirus in Scotland, partnering with Scottish Government, Scottish Council for Voluntary Organisations (SCVO) and other funders to distribute funds from three substantial emergency programmes (some with several waves): *'We had to move really quickly to create simplified processes, a shared platform, shared application forms, shared reporting. We just had to get on with it'.* It also enabled existing grantees to use their funding flexibly. And trustees agreed two targeted emergency programmes for them in response to funding gaps.

All hands were on deck from the start. Staff who were unable to work on face-to-face programmes joined colleagues and external assessors in grant-making. And operational and grants administrative staff began turning around IT and process amendments in record time. Decision-making has been ferociously fast: one programme involved processing nearly 2,500 applications to a 10-day turnaround. And volumes have been way outside the normal: *'We made more payments in 10 weeks than we would usually make in a year'.*

How Corra's learning approach has performed under stress

Strategic framework

As in 2019, both trustees and the senior team emphasise the importance of organisational alignment behind values and strategy in enabling good learning and clear, confident action: *'Other people's awareness of our values, aims and approaches is money in the emotional, practical and relationship bank. The team work hard to help people really understand who we are and what we do'.* Good, collaborative work had gone into the development of Corra's new strategy, built on conscious efforts to support trust and confidence between board members and the wider staff team, which *'we will have to work out how to maintain in Zoom land'.*

Some of the early decisions about how best to respond to the emergency *'were very much about gut instinct. Learning was in the mix but there was much less reflection'.* But there is a shared sense that the emergency response is firmly embedded in Corra's new strategy: *'I couldn't see it straight away but what we have done has progressed it quickly, because it forced boldness'.* It rests on deep conversations in the past about, for example, *'the optics of being close to government'.* It is supported by established values and principles: *'It's hard to be thoughtful about your grant-making when you have to get 25 million out of the door in 3 weeks. But the general model is based on sound principles, such as proper listening, clear messages, and trying to respond to people's needs'.* And it reflects a high level of comfort with learning through uncertainty. Corra feels able *'to go forward with the expectation that we can do something useful and that we will learn along the way. We've embraced the potential of uncertainty and it has stood us in really good stead in such an uncertain time'.*

Board oversight and learning culture

The board and senior management attitude to learning remains a powerful driver of culture. Trustees describe a *'mature approach to the governance of the emergency situation'* and a senior management team with the confidence to be *'open, honest and transparent and challenging with the Board'*.

Trustees feel they have been kept *'well appraised of what's going on at a significant rate'*, which has enabled them to focus on important questions of capacity and stretch and on *'doing the "supporting the learning thing". It's challenging to hold onto high standards while getting things done at pace. But they said they'd be "more worried if you said nothing had gone wrong"'*. Formal reporting mechanisms and the checks and balances of good governance are essential, *'but a lot of what we are learning is not coming up neatly under KPIs. So, for example, how have our staff been able to respond in this way? How have they been supported, what could we have done differently and what can we build on? This is at least as important as what the KPIs look like'*.

And the board continues to look forward and consider learning from a strategic perspective: *'Some people have suspended their discussion of strategy until things are clearer. But why? Things are never clear'*.

Capturing data

The technical demands on grant management systems of launching and managing so many new programmes in such a short time have been very high and staff not usually involved in grant-making have had to come to terms with using unfamiliar systems very quickly. But it is clear that the streamlined Salesforce database being introduced at the time of the 2019 convening has moved from 'new system' to 'established habit'. Staff are more comfortable with mechanisms like the weekly learning diaries, and capturing key messages in the support and visits record. And both can be qualitatively analysed, as time allows, adding considerably to the richness of data available.

Informal, real-time learning

Corra has given good attention simply to keeping people in touch with others, so they feel connected to colleagues and properly supported. Regular Zoom team meetings, individual chats, *'sharing photos of children, pets and cake'* on WhatsApp, quick updates on Workplace, more one-to-ones, updates from the senior management team, some formal consultation, social events and many other channels have been developed or emerged. And Corra is ready to experiment and change things if they aren't working: *'People don't like all being on a big Zoom call so, at the last team blether (that's what we call our whole team meeting), we broke into small groups'*.

Individual and cross-team learning has felt strong throughout the emergency. Although working at a distance, the whole team has been *'knitted together'* as never before, with everyone bringing different skills, experience, and sustained energy to a collective effort outside everyone's comfort zone. Huge amounts of informal learning have been flowing through the team, in their exposure to thousands of funding applications and regular conversations with applicants, grantees and grant makers in partner organisations.

Corra resisted the impulse to introduce systematic surveys. Rather, it wanted to tap into this rich stream of unprocessed, first-hand experience to help inform policy and practice. But it needed to be realistic and light touch. So, building on the small reflective meetings for staff that had become an important part of their learning, the Head of Learning Development adopted a similarly straightforward approach. She set up three internal focus groups to consider two broad questions: *'What are your observations and perceptions of what's happening for communities and charities across Scotland?'*; and *'What has worked about the processes, what hasn't and what could be different?'.* These proved both popular and productive: *'There was no "fakeness" about the reflective meetings. The learning time felt purposeful – significant and real'.* Discussion ranged widely across processes, criteria, speed, trust, risk, communications, managing expectations and much more. And the groups came up with practical proposals for immediate improvements, as well as longer-term reflections on, for example, the learning that had come from funding small social enterprises, and about how language and assumptions can stand in the way of applicants unfamiliar with charitable funding.

External partnerships

Due to a high level of coordination by SCVO and others and the ease of meeting, engagement with others – especially other funders – has been *'so regular as to almost be over the top!'.* But this intensity is showing positive results: *'What's coming out now are really concrete ideas, like a shared funding platform and an eligibility checker to cover lots of Funds'.* The sense of common cause in an emergency is powerful: *'In Scotland, it has been a relatively ego free time – we're here to enable things to happen. And this feeling is matched in our partnerships and in dealings with the Scottish Government'.* Sitting with a different hat on in some of these meetings, a trustee described Corra as *'very reflective in that space and very willing to be questioned'.* Mistakes have been made and elements of various programmes have come in for criticism, but *'critical conversation is something Corra is always willing to have'.* And Corra quickly took advantage of a range of learning from the first wave of Scottish Government funding to *'give quite challenging reflections on what Government was proposing and what it should do'* in its second.

Partnering with communities and organisations

Grant-making at volume and speed and the move to a digital world are both testing assumptions and established practices around consultation, engagement, and participation. With voice and power central to Corra's new strategy, the challenges and opportunities are *'very front of mind'.*

Corra is a relational grant-maker by nature. And the process of emergency grant-making can feel brutal: *'You don't have time to sit and talk – you have to get on. Hopefully, you have built up relationships before but here we hadn't. So you work to build in some checks and balances. Sometimes you will give the money in ways that are not as useful as they might be; you miss some groups and there are some gaps; some vulnerabilities are not identified'.* But it is also raising strategic learning questions about *'the application of trust in reviewing applications'.* A lot of time is usually spent in conversation and visits. Working more lightly and at greater speed *'may be a good thing if we are seeking to shift the power to the people we work*

alongside. There is always a danger of defaulting to the position that we might know best – and we've had to put that aside. Power shifts and trust shifts – there's a real learning point here'.

New, broader programmes have seen a lot of 'new to Corra' people coming through. There have been criticisms – about near misses against criteria, for example, or routes to funding – and more complaints about decisions: *'I've had more difficult feedback from organisations over the last few months than ever before – these are really make or break decisions'.* Judgements have to be made but *'critical and dissenting voices need to be heard and respected'.* Corra will go out with its formal satisfaction survey soon.

Digital engagement is causing real challenges in some areas: *'Work in communities still feels intrinsically face-to-face'.* And some adjustments feel challenging: *'Digital has held well with existing grantee relationships but we're not yet sure how to build new relationships well in digital space. Or to make sure they are deep enough'.* But it is also opening up new ideas and new learning questions: *'The new strategy will increase participation around grant-making – which would traditionally have been face-to-face. I can see real potential to make it more inclusive – but how will that work?'.*

Resources and energy

Corra's investment in dedicated learning staff is deliberately modest. But a second post was created early in the emergency to help keep on top of the data and allow the Head of Learning Development to *'remain in the heart of it all, keeping an eye on everything, creating spaces and thinking all the time about "how are we learning? Is this an opportunity to learn?"'.*

This period has also seen a step up in learning led by peers, with people sharing their skills to support each other in managing unfamiliar ways of working, *'such as "good things you can do with Microsoft Teams"'.*

Learning for the future

For all its challenges, Corra hopes that this time will prove a rich source of learning: *'It would be a very strange experience if everyone came away saying "wasn't it all wonderful and wasn't everyone marvellous". We've been working on steroids from a bedrock of experience and must learn from what hasn't gone so well'.* The task will be substantial, especially alongside Corra's continuing commitment to 'stepping up' within such a fast moving and complex external environment. But the big learning questions inherent in the new strategy – about shifting power to communities and supporting connections to influence change, for example – provide focal points for deeper enquiry. And Corra hopes that its learning will equip it to more effectively embrace its preferred ways of working, enabling it to:

Be bolder. The emergency has demanded *'a faster pace and a sense of perspective'.* It has enhanced individuals' *'ability to say what we are feeling – to be open and honest about something really challenging',* leading, for example, to deep discussion and active steps to respond to the profound challenges inherent in the devastating impact of coronavirus on ethnically diverse communities.

Be quicker to share. *'Corra has prided itself on doing things really well but we've become comfortable with "this is good enough – this is what we know now" rather than working it up until it's perfect'.* It is more ready to think in public – *'we've published more reflective blogs than we did in the whole of last year'.* And it has become more relaxed about providing a platform for other people's voices.

Be ready to engage intensively with others in trying to do the right thing in a complex and changing situation, based on sharing of skills, clear principles and a commitment to learn and to do better: *'Some of the best solutions come from having some courage – saying "I can live with that risk"'.*

More broadly, Corra hopes that the experience of coronavirus will have a lasting impact on power and relationships in Scotland: *'In an emergency, to get the money out the door, you need to trust the staff, trust the team and trust the people on the ground'.* Although far from flawless, a new way of doing things has been tested – and tested at scale: *'We've pared it all back and done some new things, because this was the right thing to do – things have become possible'.* And the practical learning it is generating has the potential to help drive a genuinely new way of behaving and acting, built around radical shifts in relation to risk, power and control. This, Corra believes, will support a much more inclusive approach to shaping the future for Scotland: *'Conversations about the future can't happen in any one room, or around any one table. They need to be wide ranging, reach right into communities, and listen – and not just rely on the traditional structures that so often exclude (whether intentionally or not)'.*[1]

1 https://www.corra.scot/learning-and-reflections/the-coronavirus-storm/