

# Learning in uncertainty

*Learning and evaluation in trusts  
and foundations during Covid-19*

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## Introduction

At the Evaluation Roundtable<sup>1</sup> Convening in January 2019, we considered how two foundations – Corra Foundation and Pears Foundation – were working to ‘make learning everyday’. Eighteen months on, the environment has changed in a way we would never have imagined. Facing a volatile and uncertain future, foundations need learning more than ever to support tough decisions about maximising their contribution. In support of the discussion at the December 2020 Convening, we revisited the Corra and Pears Foundations, asking them to share how their approach to learning had performed under pressure and to give us their initial thoughts on how, in the longer term, this will influence the way they learn.

The session was framed around the growing appetite for learning in trusts and foundations to help ensure that the Covid-19 crisis acts as a transformational moment. Many funders responded to the initial emergency with new and flexible practices better suited to conditions of complexity and uncertainty. The challenge to the learning function is how best to inform, support and underpin this more agile and collaborative approach, resisting the ‘*snap back into calcified, inflexible systems*’. The Convening saw the start of important conversations about how learning systems and practices can enable individual funders and the funding sector as a whole to transform away from centralised command and control models towards approaches which enable experimentation in all different parts of the ecosystem: *‘What we did this year is what people have wanted us to do for a long time. So, how do we use this moment as a catalyst – not just individually but collectively – to shift the relationship between funders and funded organisations?’*.

This short report shares four key insights and concluding reflections. During 2021, IVAR will support further exploration of these themes through the Evaluation Roundtable Community of Practice.

### **<sup>1</sup>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.

With thanks to 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](mailto:vanessa@ivar.org.uk)



# 1. Build a clear line of sight

## Insight One

*'One of the principles implicit in our conversations about new ways of learning is the idea of holding clear line of sight ... And, critically, the degree to which people have enough shared line of sight to what they're trying to make happen, so that you're always learning towards something specific, and your system is sufficiently aligned. [Then] you have, in effect, some guardrails and parameters for action.'*

## Discussions

The experience of 2020 has further demonstrated the importance of a clear 'sense of self' to an effective foundation and to its learning function. Shared organisational purposes and values, that are rigorously worked through into day-to-day practice, provide 'the foundation for agile action – there are no disconnects'. This organisational alignment creates a pathway for action 'when need is huge, and the options are endless'. For learning staff, it 'enables us to actively embrace uncertainty. To accept the limitations on what we can know – and act anyway'.

For some, making quick decisions with limited information has tested and sharpened core values. For others, it has been instrumental in surfacing those values and driving them through into practice:

*'We were really helped by setting up a group outside of the usual committee structure that was focused solely on our emergency response – I think prior to this, we've really struggled to articulate our values. But we came full circle to our very original purpose through this new fund. This is informing our approach on many different levels going forward'.*

Retaining and developing a laser-like focus on the purpose of learning is a priority for many:

*'Being clear about what you/trustees/others want or need to learn about and why is really important. To hone in on the questions of particular interest, when there is so much information swimming around and people are very busy doing'.*

There are exciting opportunities to challenge and change established practice to deliver greater value:

*'It's about how we use learning to improve people's lives not just about writing reports, etc. We can act in a way that pursues positive social change relentlessly, but sometimes the progress we make is slow. This year, some of that has been accelerated greatly. How do we embed this into our working cultures and use this situation to fundamentally re-think some of the success measures we previously used?'.*



A faster and more flexible approach to learning has been a liberation for many. Boards, staff teams and grantees have – to varying degrees – been engaged in a much more fluid process of *'questioning, learning, reflecting and acting'*. There is an opportunity to redefine good learning behaviour away from *'the usual old questions about performance against projected outputs, outcomes, etc.'* and towards informed, responsive action: *'Be prepared to make mistakes, particularly during a time of crisis. But embed reviews and adapt as quickly as possible. Celebrate the ability to adapt and learn'*. Understanding what has stood in the way of change in the past will help maintain forward momentum: *'We have moved further on our journey to award more core funding. This is something funded organisations and many at the Trust have wanted to achieve for years ... what is it that has held us back until now? Risk? Fear? Challenge of the unknown? How do we make sure this doesn't creep back as we move into the new normal?'*

## 2. Retain a sense of urgency and collective effort

### Insight Two

*'What happens to partnership working, or working collaboratively, under the context of extreme pressure? The answer is that all the junk that usually gets in the way of collaboration – like ego and territory – falls away, because the work becomes the thing that matters most ... The idea that we HAVE to make something happen stays at the centre.'*

### Discussion

The instinct to collaborate, partner and support has been strong during Covid19:

*'We're in a time of collective sense-making – no-one has all the answers – which can offer up more informal learning and sharing opportunities.'*

For example, it has been seen in:

1. **Funder partnerships:** Instead of being slow and fraught with complexity, there are many examples of quick and vigorous collaborative action between funders. Instead of becoming bogged down in *'how we differentiate/individualise ourselves'*, some are proving generous and effective partners with their peers:

*'I'm definitely for giving up some of our perceived uniqueness ... concentrating on that which we share and that which unites us, even if it means we take very different approaches'*.

2. **Flexible working:** Many have worked to build more trusting and supportive relationships with voluntary, community and social enterprise (VCSE) organisations, particularly with existing grantees:

*'Breaking the link between charities' work and reporting for funders has been hugely freeing. Someone we fund said that flexible funding has enabled them to try things they've been trying to do for years. Previously funding was a barrier, "We'll fund you to do x and you can't change that". Now, it's like funders are*



saying "We have money, you don't, here it is". They are free to work out the best thing to do'.

3. **Cross-sector engagement:** Some are firmly taking their place in the wider eco-system, influencing others and being influenced in return:

*'Our learning system is just one part of a larger one. We need to use our voice to push government funders to stop asking for fortnightly monitoring!'; 'Helpful external sharing needs to take people's limited bandwidth into account. Real time, imperfect, short reflections can speak to that need'.*

The sense of urgency has been powerful. The challenge is to sustain it in tackling both the longer-term consequences of Covid19 and other crises of devastating proportions:

*'I do wonder if it's just that Covid allowed our actions. We saw the world turned upside down, and we knew that our money could make a difference. The thought of not doing something – unthinkable! But, we're not doing this about the climate crisis'.*

Questions of trust and partnership between funders and VCSE organisations are very front of mind. Despite the many efforts funders are making to bring greater trust into relationships with grantees, progress often feels fragile and liable to revert unless actively nurtured:

*'Sometimes we rely on grantees to give us the confidence to act, through giving us loads of information, budgets, plans, etc., which assuage our uncertainty/anxiety. But we can also (instead) get that confidence from 'ourselves' – from management, culture, colleagues and through reflection and commitment to learning/adaptation'.*

There is also a pressing need to extend trust and support beyond current grantees and into the wider VCSE sector:

*'This point about new partners is very important to us in the context of Black Lives Matter and the unequal impact of Covid on BAME<sup>1</sup> communities. Having decided we saw our role as a responsive grant maker, the crisis gave us the opportunity to properly interrogate our track record of bringing on board BAME-led organisations'.*

Two perspectives were offered on the challenge of building trust in situations of an imbalance of power. The first proposes a shift away from the idea of basing trust on established relationships (we trust you because we know each other) towards a stronger presumption of trust in all types of engagement with VCSE organisations (we trust you unless you give us reason not to do so): *'Supporting new organisations and becoming more inclusive means embracing "assumed trust" not just "relational trust"'*. The second suggests a more radical reframing of the question of trust: *'Who needs to be trustworthy? Is it, "We will begin to act as though we trust you." Or should it be, "How do we behave in trustworthy ways?" Who is accountable to whom in this moment? This brings us closer to addressing questions of equity and power'.*

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<sup>1</sup> (Black, Asian and Minority Ethnic)



### 3. Make thinking visible

#### Insight Three

*'If we think out loud with each other – if we 'make our thinking visible' – it provides an opportunity for people to offer alternative perspectives or identify the powerful questions we should be asking that would enable action. It stops us getting caught in the paralysis of constantly trying to get it perfect or right. In a crisis, in uncertainty, what matters is: are we focused on the right thing, given our position in the ecosystem? And does what we are asking enable us to act?'*

#### Discussion

There is a strong imperative to capture what has been done during Covid19 to prepare for the future: *'How do we avoid finding ourselves in a (crisis) situation again where we end up having to deliver lots of new ways of working that we should have been doing already?'* Learning staff can feel the potential this has to transform the contribution and effectiveness of foundation practice:

*'This feels like a 'once in a lifetime' opportunity. The importance of taking stock and reflecting can't be overstated. We have pivoted quickly, learnt lots, changed, developed and we cannot lose this knowledge and go backwards. Keep being amazing!'*

The challenge is to create the right spaces to enable this reflection and ensure there is the time for them to be held given the pressures of demand on operational staff and the constantly changing environment. The immediacy of the link between learning and action is motivating for operational staff: *'It's about being honest that we are all on a journey and gathering intelligence as we go'*. However, time is at a premium:

*'I knew it and have been banging on about it but it's so important to ensure my team takes some time to pause and reflect on what we have learnt in the past few months. Not just about what's happened with our grantees but what's happened in our foundation in terms of attitude, process and skill'.*

As a result, purposeful, collective reflection is increasingly taking the place of detailed reports and analysis:

*'Sometimes, when faced with different circumstances and scenarios, we are forced to stop our inertia of business as usual and revisit what is really important to us or not, and how this looks in this new context. Doing this collectively, making it explicit and visible to one another, so we can help each other recognise it requires a dedicated space. We should not expect these things to happen spontaneously'.*

Personal circumstances, isolation and working at a distance continue to create challenges:

*'We have to have realistic expectations of our own ability to reflect at this time: Zoom fatigue, flexible working, higher workloads, etc., all make creative and reflective thinking and sharing really challenging'.*



The reduced opportunities for informal learning are keenly felt: *'It's made me appreciate the importance of the informal conversations across the office. Without it, we can miss the best ideas, learnings and reflections'*. However, people have also experimented and developed new skills:

*'There are so many different learning styles. This period has forced us to stretch into ways of learning that we wouldn't have tried before, e.g. those who learn experientially have had to learn without site visits, those who learn from spontaneous networking have had to find other ways to stimulate their thinking'.*

Big questions remain about how foundations effectively engage with VCSE organisations in 'thinking out loud' with each other in response to the pressing social issues both predating and arising from Covid19. More debate is needed about the role that independent foundations can play as a partner in the collective effort and the imperative *'to make meaning together and not just behind closed doors'*. Should this shift gather momentum, learning staff will be deeply engaged in critical questions about *'whose social meaning gets made and who gets to make it?'* and the changes in relationships and behaviour that this will need.

## 4. Return learning to the system

### Insight Four

*'We need to be looking hard at the mechanisms that are set up in our institutions to enable learning – both formal and informal – to flow back to the system, so that it's not stuck in one head and everybody can benefit. One of the key questions is how much freedom the system enables people to have. How much agency are they given to experiment with solutions that work in their own contexts? More specifically, to what extent do the constraints built into the system – for example, your reporting arrangements for grantees, or how staff are expected to perform, or the structure of board meetings – get in the way of that?'*

### Discussion

The job of managing inputs and information flow during Covid19 has been complex. For many, informal learning has taken centre stage:

*'I think informal learning is a key source of data and part of the process. We have learning questions that we will answer with informal data, but we'll bolster that with more 'formal' data sources – grant-making data, surveys, etc. I think, at this time, informal learning was crucial because other methods may have a bit of a time lag'.*

Agility and speed, too, have not proved inimical to robust practice: *'Funders can learn quickly! It doesn't always need an 18 month evaluation. But we need to be careful that quick learning isn't just anecdotes'*.



Everyone has experimented with ways of capturing data and returning it to the system in a light and usable way. Some have found written records a trial: *'A "communication" tab on our database became another stick we beat ourselves with when it wasn't kept up to date'*. For others, they have become an integrated part of day-to-day working: *'Isolation has meant more has to be communicated in writing'*. Some have found it impossible to replace *'the osmosis of the office and the spontaneity of conversation and shared intelligence'*. Others have developed alternatives that work well for them:

*'Right from the start we've had twice daily all team check-ins – 9.30 & 4.30. Only for half an hour. It sounds excessive but it's actually been so valuable ... sharing learning, having some of those across the office chats, staff wellbeing, etc. We're still doing them now and have no plans to stop'.*

A key question is how, and how far, learning has been successfully shared across foundations: *'I'm wondering how foundations might do more to create conditions where their "whole system" can learn better (not necessarily assuming centralised learning)*. In general, learning staff are encouraged by the greater level of flexibility and engagement with learning they have seen in their boards during the crisis. Some reported more regular communication with boards: *'We found we had to share more learning information with the board to keep them alongside with the approach – which would be good to build on'*. Others found their boards more empathetic:

*'I think that it's also that Covid affected everyone – albeit in different ways. But for the first time, our board, who don't have the same lived experience as our grantees, are having to deal with the same uncertainty and are therefore more empathetic to the issues and challenges they are facing'.*

Some changed their own behaviour, with positive results:

*'One thing that has stayed with me from Roundtables past is that our tendency to manicure the presentation of material to trustees inhibits the space for a shared endeavour of learning between staff and the board. The crisis has meant bringing work in progress to trustees is the norm'.*

Despite these positive experiences, there are concerns that any easing of the crisis will raise anxieties in boards – and in teams – about loss of process, exerting a strong pressure back towards *'the old ways of doing things'*. Learning staff have an important role in identifying the unspoken assumptions that sit within these anxieties and develop strategies *'to break these thinking patterns – to build in interruptions around "how to think"'*.



## Concluding thoughts

In summary, there is something about this moment in time. It invites from us all a few habits or behaviours that could make this period of learning really powerful, could make it transformational. For that to happen, we need to acknowledge that we have finite mental and emotional capacity, and we have finite time. So, we need to ensure that we are asking the most meaningful questions for our learning right now.

Are you asking the right question, given what you are trying to make happen in the world, and given your motives? Are you making your thinking visible? Making your own messy imperfect thinking visible is what humility looks like in practice; it invites in people with alternative views on the world and with different interpretations of what is happening. This feels like a better way, because learning is essentially a social activity generating meaning. How, together, do we make this meaning count to decide what we should do next? The more you can make your own thinking visible and invite others to do the same, the more we will move towards transformational learning that helps us see what is possible and the more likely we are to then return learning to the system, and to the universe of partners with whom we work.

## What next?

Throughout 2021, we will explore the themes and questions raised in this paper at the Evaluation Roundtable Community of Practice. Please contact [events@ivar.org.uk](mailto:events@ivar.org.uk) if you would like to become a member.

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