

Learning in the flow of working

Learning and evaluation in trusts and foundations during Covid-19

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Introduction

Since March 2020, learning and evaluation staff have been supporting their trusts and foundations in responding to the crisis of Covid-19 with new and flexible practices, better suited to conditions of complexity and uncertainty. Through the Evaluation Roundtable Community of Practice¹, IVAR has created a space where people can share challenges and dilemmas, and learn from each other's experiences in these efforts.

Terminology

Within the community of practice, we use the term 'learning' to mean *'not monitoring, not impact assessment, not log frames, not descriptive reports, but properly focused, informed consideration of truly mission-critical questions – about both strategy and practice – which lead to action'*. When we talk about 'the learning system', we are thinking about *'planners and decision-makers at all levels, faced with complex questions where there is no "right answer" and finding a way forward by using a range of data and insights to inform their thinking and their actions'*.

We have seen a growing appetite to make Covid-19 a transformational moment, enabling the learning function to inform, support and underpin a more agile and collaborative approach, resisting the *'snap back into calcified, inflexible systems'*. The convening of the Evaluation Roundtable in December 2020 saw the start of [important conversations](#) about how to make this aspiration a reality: *'How do we use this moment as a catalyst – not just individually but collectively – to shift the relationship between funders and funded organisations?'*

Our first round of meetings of the Community of Practice for 2021 focused on returning learning to the system, in particular the mechanisms that are set up in our institutions to enable learning to flow back to the system to enable action, *'so that it's not stuck in one head and everybody can benefit'*. How well do they support agility and experimentation? Do they value and make good use of different kinds of learning – both formal and informal? What gets in the way of good learning? This briefing draws on the contributions of 19 learning and evaluation staff from 17 foundations, and offers our reflections on the questions and opportunities for funders that they raise.

¹About 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.

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



Taking stock

Entering 2021 in lockdown with long uncertainty ahead, it is proving hard to hold onto what has been achieved in 2020. But the experience of the last 12 months has shown how lighter, faster learning, and greater comfort about operating with uncertainty, have transformed the sense of energy, engagement, and contribution for many: *'The emergency has really pushed learning up the agenda – I've been having conversations I've never had before'.*

With very little time to think, learning staff have got on with generating a broader and more nuanced suite of techniques and approaches that have created a new sense of relevance and purposefulness, as well as supporting different learning habits and skills: *'The thing to celebrate here is that learning is a live part of our tactical decision-making. The challenge is maintaining this agility, while keeping the foundational, structural learning cycles in good shape'.*

This experience enables a more nuanced understanding of what 'good learning' looks like, embedding learning in everyday practice, and giving it a stronger voice at the strategy table. But there are strengths in 'pre Covid' ways of doing things too. Taking the best from both is a job that needs time and thought: *'We shouldn't pitch the old structures against the new but think about what helps with understanding priorities and purpose'.* A key task now is to maintain sufficient momentum, at a point when so many people are close to running on empty: *'Everyone is finding it hard to cope with more change at the moment. We need to bring the intensity of the crisis response down'.*

Key lessons

The experience of the last 12 months has revealed or reinforced seven key considerations for a healthy learning system.

- 1. Good learning has many dimensions.** We have seen a clear shift from learning characterised by set piece evaluations of funded work and a neutral – or even passive – knowledge management function, to something more interactive and dynamic. Creating spaces for conversations about pressing issues; setting up mechanisms for 'brain dumping' ideas, examples, and questions; linking back into individual one-to-ones, for example, have all played a stronger role: *'Our focus has been on learning things in the flow of working'.* Learning staff are working to find the right balance in this changed environment, recognising that, for many, a focus on strategic learning questions around "so what" and "what next" must be balanced by attention to robust underlying data around "who, what, where and to what end".
- 2. Clear and shared purposes around learning are critical.** Without clarity of purpose, learning activity is rudderless. The crisis delivered simple imperatives: *'It was the shared collective nature of the crisis response that made it work and gave it energy. But the world is getting more complex again'.* Predicting and planning information requirements and flow can feel overwhelming: *'We are in danger of it becoming frenetic and excessive. So purpose is vital, however modest or temporary'.*
- 3. Learning must be usable and available.** Good learning can validate and strengthen strategies and practices, as well as highlight opportunities for improvement and change. But it must be meaningful and targeted. When returning learning to the system, the conditions for 'closing the circle' need to be



identified so that learning successfully reaches its intended audience and gives them what they need.

4. **Planners and decision makers need to be receptive to learning.** This is the virtuous circle we are aiming for: *'The system has to adapt to new learning – and there is often a push back. What are the habits and rituals that enable change to be made?'*
5. **Leadership is critical to an open learning culture.** Learning cannot effectively return to the system if learning behaviours are not explicitly valued and rewarded: *'Leaders need to be clear about the value of learning, what kind of learning is given weight, and how it will be received and used. This gives staff the confidence to contribute, share and use it'*.
6. **'Learning in the flow of working' is a powerful model.** The pandemic has prompted new habits around learning, making it a part of everyday practice rather than a series of bounded, isolated events or a separate set of skills. Going with the flow of energy is likely to be the best way to consolidate these gains when people remain under extreme pressure: *'The first step may simply be to think about reinforcing habits before thinking about what new skills may need to be built'*. It also reinforces the sense of learning as an embedded activity, where people are sense-making together: *'Learning with people helps safeguard against it becoming too extractive'*.
7. **Balance consistency and flexibility.** A good learning system is about many things working in harmony: *'What conditions need to be in place for the effective feeding back of learning into the system? Behaviours, systems, ways of working, quality and usefulness'*. Some core activities must be maintained to keep underlying data in a robust and reliable shape. But many other mechanisms to support exchange and engagement can be regularly flexed, changed or halted: *'It's important to consider what was appropriate at the first lockdown and what's appropriate now'*.

Challenges

What does good learning look like?

Strategic learning is built on a range of data (from formal, structured external evaluations through to conversations and observations). For some learning staff, there is work to do in building consensus around the value of both formal and informal data in supporting evidence-based judgements and decision-making.

Lighter, more agile, more provisional learning has come to the fore during Covid-19, and made an essential contribution to foundations' responses: *'Informal learning has been the most valuable resource and has delivered the best insights during this time. It is a very valuable asset'*. But for some foundations, it remains a stop gap, at best: *'How do I communicate the importance of informal learning to the Board and senior decision makers?'*

There are, of course, potential weaknesses to guard against: *'You need to push back against the striking anecdote or strongly expressed opinion'*; *'It is essential to be aware of and work on unconscious bias'*. But all mechanisms call for a critical eye; if learning staff are convinced of the value of different types of data, they need to make a strong case for their quality and reliability and the learning they support: *'There has to be a firm foundation for the information that we convey, but the confidence of our presentation is also important'*.



Capacity and priorities

The influx of new ways of working and the accelerated appetite for insight is putting pressure on learning teams: *'We need to analyse more data, more quickly because people want to see it now. We just can't deal with the level of work'*. Few are expecting increased capacity at this stage, so other responses are needed, for example, insisting on clarity of purpose; remaining agile; and ruthless priority-setting.

Operating well in uncertainty

Like everyone, learning staff are working out how to operate well in radical uncertainty. Although all are anxious to get away from framing everything as a crisis – *'it's not sustainable for people to maintain a crisis response'* – some stress the need to bring a sense of urgency into learning practices for the future: *'I would argue there is more of a crisis now than there was in the beginning. Mental health, missing education, and everyday emergencies, like domestic violence. How do we approach these emergency issues?'*.

Looking forward, *'it is hard to know what data to collect right now that will be of value in the future when I don't know what the future holds'*. This is compounded by quicker and more fluid time horizons; high demand and complexity leading to uncertainty about priorities; lack of informal access to colleagues as remote working continues; and the personal and professional pressures of the continuing pandemic. A key challenge is how to create the space to make considered judgements: *'There isn't time right now to pause, reflect, decide and move on – the established linear pattern isn't working'*.

Questions and opportunities

By enabling people to learn in the flow of working throughout the pandemic, learning staff have made an invaluable contribution to the ability of trusts and foundations to be more agile and flexible. Learning has come out of the wings and moved centre stage, all the time building valuable knowledge and experience of learning practice, culture, and behaviours. Mirroring the commitment of so many to use Covid-19 as a springboard for [better practice in grant-making and grant management](#), the challenge to foundation leaders is to ensure that this enhanced profile and contribution of learning can be retained and developed for the future.

There is, however, a pressing need to move from a frenetic mode of working to something that feels more manageable, both for the system and for individuals. Under continuing pressure and uncertainty, this calls for clarity from decision makers about the critical questions that need to be answered. And it calls for trust in learning staff to make judgements about how best to support their resolution, drawing data from across the full spectrum of formal and informal learning activities.



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