Giving learning a seat at the board table

An Evaluation Roundtable briefing

June 2022

Introduction

At IVAR, we see learning as the focused consideration of truly mission-critical questions which lead to action and change; and we have long championed it as a driving force for foundation strategy and practice. In this briefing, we articulate some of the challenges that foundation learning staff, CEOs and boards face in moving learning from the margins to giving it a seat at the board table.

Foundations are increasingly moving towards more flexible practice in both grant-making and learning, putting the needs of those they fund first. We have seen a growing appetite to make Covid-19 a transformational moment, enabling the learning function within foundations to inform, support and underpin a more agile and collaborative approach. Significant gains have been made over the last two years, with lighter, faster reporting, and greater comfort operating in uncertainty. However, new learning priorities and expectations are not yet clear, making it difficult for learning staff to determine *'what systems for learning need to look like now'*, and, critically, how to resist the *'snap back into calcified, inflexible systems'*.

Traditional ways of collecting and reporting data are having to evolve. This is creating some anxiety, especially when it comes to trustee expectations and the shift in roles required for working in an emergent and complex environment: *'If you accept the degree of uncertainty is relatively permanent, then your own expectations of what can be achieved through funding need to be framed in that different context'.* Changes in reporting and data collection require a revision of certain expectations and roles, especially in relation to trustees: *'There can be a tension between communicating what the board want and what you need as a team'*. This links to a familiar tension between 'formal governance' and 'learning' – often predicated on two unhelpful notions: first, that learning is, somehow, a 'nice to have' luxury and, second, that governance is exclusively about oversight and monitoring. Recognising that the development and guidance of strategy is at the heart of a board's governance function can help trustees adjust the balance of their focus, enabling them and staff to approach complex work with a spirit of curiosity and adaptation, confident in the knowledge that good learning leads to action.

Our most recent engagement with these questions was in three convenings of the Evaluation Roundtable[1] – in London and Edinburgh – for over 70 learning staff, trustees and CEOs from 40 foundations. Key to our approach was the idea of building empathy between staff and their boards. Our proposition was that with a fuller understanding of each other's perspectives and experiences – trustees, CEOs and learning staff – foundations will be better equipped to help move towards a different kind of learning, characterised by curiosity and reflection; and more trusting and respectful learning relationships, both internally and with funded organisations.[2]

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[1] IVAR has convened the UK Evaluation Roundtable since 2014 for foundations to reflect on the design, development and use of different approaches to learning and evaluation. If you are interested in joining, contact houda@ivar.org.uk.
[2] The convenings built on work with funders and charities, to sustain and develop more open, trusting, agile and collaborative practices in grant-making, learning and evaluation. This includes discussions with the Evaluation Roundtable's Community of Practice, our work supporting charity leaders since the outbreak of the pandemic, our Open and Trusting Grant-making project, and work with The Robertson Trust and Carnegie UK Trust.

Giving learning a seat at the board table: Six challenges and action to overcome them

Staff and trustees cited six broad challenges to learning, and we asked some of the attendees from our recent convenings to reflect on how we can shift practice.

1. An uncertain context

Covid-19 has only served to reinforce an enduring truth about social change work: it is messy, unpredictable, and involves testing, experimentation and adaptation – with no real guarantee of 'success'. Despite this, some learning staff continue to experience trustees as '*not ready, or lacking appetite, to embrace uncertainty and the possibility of failure*'. To compound matters, many boards rarely communicate their risk appetite, leaving staff to make assumptions and, often, adopt risk-averse positions at odds with the nature of the work being funded.

Sharing difficulties and challenges – 'warts-and-all'
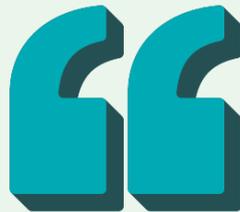
My three years as Grants Committee Chairman at John Lyon's Charity have imbued me with great admiration for the work done by our executive. But I often wonder whether we as trustees collaborate with them as effectively as we could.

If trustees are properly to fulfil their role, they must be prepared to dig a little deeper. This requires, in my view, an adjustment to the mindset of both sides; a willingness to question on the part of the trustee, and a preparedness, on the part of the executive, to present the risks for a 'warts-and-all' approach to grant-making. The executive should report, and the trustee should be willing, if they can, to back the judgment of the executive. Trustees understand (or should understand) that organisations have difficulties and challenges, and should not be shielded from those; far from being a reason not to fund them, it will often be the precise reason funding is needed."

Hon. Andrew Butler QC, Trustee and Chair of the Grants Committee, John Lyon's Charity

Further reading:
Thinking about… risk sets out a framework for helping foundations to achieve greater clarity about the different aspects of opportunity and risk inherent in their strategies and aspirations.

2. The purpose of learning

A lack of clarity and transparency about what a board wants to learn or measure, and why, makes it difficult for learning staff to know what information to collect and how to present it. This problem can be exacerbated by '*not sharing a common understanding of key, basic terms – like "impact" and "success"*'.

3. Expectations of learning

For many learning staff, expectations of what can be achieved through the foundation's funding, and over what time period, are the cause of real frustration: '*It takes time and patience to get to the bottom of issues. But boards want to see impact, before impact is ready*'; '*Real social change takes time and there is a need to deepen understanding about what the money and the board's decisions have the potential to achieve*'.

From attribution to contribution

As we seek to influence wider change which lasts, rather than solely funding individual projects, the questions for our learning shift – from what impact is directly attributable to us, to what contribution are we making to help change happen? Taking this view raises fundamental questions for our governance and the way we approach risk, which we discussed recently with our Board. We agreed that we needed to make more time in our agenda to address broader questions focused on change – what are we learning, what are the implications, and how we might improve our contribution?

And that the focus of some of our standing items might helpfully shift from accounting for what we have done to exploring what has gone well, not so well, and what might worry us. It feels like there is an appetite for honest reflection about the process of change which moves us beyond the desire to report success – which, in itself, has, arguably, limited impact."

Zoe Ferguson, Head of Insight and Impact, The Robertson Trust

Further reading:
Trusting funders are not letting go of impact is a reflective piece exploring how Open and Trusting Grantmakers are letting go of many restrictions around funding, but still building a picture of the difference they – and the organisations they support – make.

4. Data

The tendency to '*see quantitative data as superior to qualitative*', as well as a lack of recognition for more diverse types of data, remains widespread, despite the upheavals of the last two years. Linked to this, a demand from trustees for data about outcome performance '*creates a lot of work and does not support judgements about "so what" and "what next"*'. For many, this is symptomatic of a narrow and closed attitude to data, and '*not being receptive to voices or opinions from outside. They want to learn but don't listen*'.

So what? Now what?
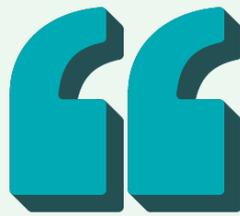
"*We have decided that we spend too much time with trustees discussing who to fund, and not enough time on "so what?" and "what happens next?". We are flipping this now. Trustees have agreed to delegate most decisions around grants to staff and spend most of the time in our Grants Committee exploring what we are learning from our programmes. We've now had three Grants Committee meetings in our new format, each focused on a separate area of our work.*

There is a noticeable improvement in the depth of conversation. Trustees feel like they are contributing more and have a better understanding of the bigger picture. Our challenge now is to distil meaningful insight from the work of our grantees and identify genuine strategic questions that our trustees can help with."

Manny Hothi, Chief Executive, Trust for London

5. Spaces and resources for learning

Finding the time to engage in learning can be a challenge, especially for those in small organisations with no dedicated learning function. People need the space to make meaningful connections with each other, to understand backgrounds, perspectives, motivations and struggles. If this understanding and connection is lacking, it is less likely staff will take something to the board because of a *'fear it won't be understood'*. For learning staff, '*the opportunity can feel squeezed*', with '*limited space for learning in* [a] *packed and formal board meeting'*, and no real sense of them '*having legitimacy as sense-makers of the data*'. For trustees, it can be hard to find enough time between board meetings for individual learning to help grapple with the complexity of the work of funded organisations.

Investing in trustees' expertise in organisational strategy
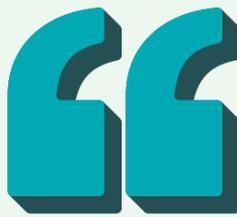
It's one thing to talk about a shift to "learning governance", but how do you make it happen in practice? At Carnegie UK, we have focussed on practical steps to create the conditions for a different kind of governance conversation; less time spent marking the minutiae of the team's homework, and more time devoted to exploring with staff a shared sense of curiosity about how change comes about. This means putting a 90-minute learning session at the front of every board agenda.

Designing workshops and breakouts which are not about providing answers to questions, but sharing insights and different kinds of expertise while identifying the questions that might be worth pursuing. Individual learning sessions are worthwhile on their own terms, but the real value is the investment in growing trustees' expertise in the organisation's strategy. Over time, board members' capacity to challenge, support and be effective advocates for our work should be significantly enhanced because of this time spent in learning mode."

Sarah Davidson, Chief Executive, Carnegie UK Trust

Further reading:
A [blog post](#) reflecting on work with Carnegie UK Trust to consider where and how learning fits into governance.

6. Relationships with funded organisations

Learning staff sense a lack of sufficient urgency around really listening to and valuing the expertise of funded organisations: '*Reporting arrangements and other constraints prevent them from experimenting with solutions that work in their own contexts, and just incentivise a false portrayal of certainty and control*'. For many, there is a pressing need to '*encourage grantees to believe we want to learn*'. Onerous and prescriptive reporting arrangements – often framed by unclear expectations and communicated through opaque language – act as a real barrier to this aspiration.

Conscious communication: The importance of clarity of language
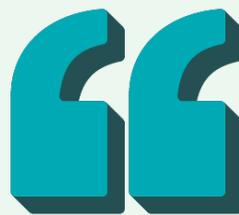
The charitable sector is infused with individuals passionate to establish meaningful change. It's fantastic to witness the consistent support being provided by various organisations seeking to address different issues. However, due to the fast-paced nature of the work, we often take for granted the language we use in our environment. This jargon, which is second nature to us, can be a new challenge for an applicant or worker just beginning their career in this area.

Moving forward, we, as grant funders, should be asking if our language gatekeeps information from new applicants and workers. How can we ensure that our processes are as transparent as possible? Whilst there is not one specific answer, I think this question should always be at the forefront of our work."

Kian Goodsell, 2027 Impact Associate, The Seafarers' Charity

Key messages about giving learning a seat at the board table

Finally, in the spirt of empathy, trustees, CEOs and learning staff shared key messages for each other to address and help overcome these challenges.

From learning staff to trustees	From CEOs to trustees	From trustees to staff
Incentivise and signal that you value learning by placing learning conversations at the top of board agendas.	**Use your position as a trustee to drive learning:** *'We want to use the board as a resource to prioritise spending time on learning and knowledge'* and *'model the learning culture that we want to see: be more curious and ask more questions'*.	**We want to break down boundaries,** so help us build relationships and trust with each other, staff and funded organisations.
Adopt a tone and attitude that embraces complexity and uncertainty, and bring a sense of true curiosity.	**Work with staff to establish a clear line of sight on strategy** to help *'get clarity about what we think we want to learn'* and then **trust learning staff to keep us on track.**	**We'd like more clarity on how we measure progress:** *'Help us achieve clarity on what learning actually means for us, and our ambitions for learning'*.
Stay focussed and anchored in the work by trying to connect your questions to the struggles staff are experiencing, and keep questions deeply rooted in strategy and strategic dilemmas.	**Think about 'impact' as contribution not attribution and understand that** '*We are improving, not proving'*: *'We are an actor in the system, but a small one, so it's about understanding what we do, and the benefits, really well'*.	**Challenge us:** *'We like to be challenged and might be more supportive than you anticipated! And that will help trustees have a sense of purpose and involvement'*.
Give staff agency over information and feedback loops by letting them decide the information to assemble which provides the best picture of what they are seeing and hearing, and then try to participate in spaces with grantees and learning staff where everybody grapples with challenges together.	**Be willing and flexible** to play around with the structure of meetings and spend less time on scrutiny and more time in learning conversations.	**Don't approach us like salespeople:** '*We want to understand the challenges funded partners and learning staff are facing, so we can make the best possible decisions about how to support the sector'*.

Concluding thoughts

The prolonged upheaval and uncertainty that we are currently living through invites from all of us a few habits or behaviours that could make 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 giving our energy to the things that have the most potential to facilitate change. The list of messages set out above points all of us in the right direction.

You may also be interested in…

Our focus in this paper has been on how people at different levels within foundations can work together to make learning a more dynamic and useful experience. Through a parallel project, as part of IVAR's Open and Trusting Grant-making initiative, we are focusing on grant reporting, which we recognise as a core element of learning for most foundations. You can read more about this by visiting www.ivar.org.uk/better-reporting

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- Cripplegate Foundation
- Esmée Fairbairn Foundation
- Fidelity Foundation
- Fondation CHANEL
- Foundation Scotland
- Friends Provident Foundation
- Inspiring Scotland
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- John Lyon's Charity
- The Legal Education Foundation

- Lloyds Bank Foundation for England and Wales
- Local Trust
- Maitri Trust
- The Mercers' Company
- National Lottery Community Fund
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