

Learning with trust, trusting what we learn

An Evaluation Roundtable Briefing

June 2023

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IVAR we listen, and
learn together



Introduction

The guiding question for the 2023 Evaluation Roundtable¹ convenings, attended by 49 staff and trustees from 38 foundations, was:

*How can we bring **trust-based learning** to life in a way that responds to the needs of different actors in the learning system and builds collective wisdom for more effective and equitable social change?*

This theme is a natural meeting point of the Evaluation Roundtable (ERT) community and the fast-growing cohort of foundations committed to [Open and Trusting Grant-making](#). Guided by learning staff, foundations are reshaping their learning systems into a critical resource for navigating complex work. Yet, as the sector has focused increasingly on how to work collaboratively for equitable social change, Roundtable participants have been asking more direct questions about how learning can better support our *collective* ability to have impact. How can learning serve the needs of multiple stakeholders in an ecosystem – charities², foundation grant managers, learning staff, trustees and other allied partners – in a way that helps us *all* improve our ability to contribute to equitable change in a rapidly evolving world?

Simultaneously, more than 100 UK funders have joined the [Open and Trusting \(O&T\) Grant-making community](#). These funders have committed to a set of practices aimed at shifting relationships between funding institutions and funded organisations to a more trusting, mutually beneficial footing. However, Open and Trusting is not simply about reducing the burden and time pressure on busy charities. A fundamental premise of the movement is that funder/charity relationships must change too, so that funded organisations have the **agility** and **agency** to work in ways that represent the interests and needs of the communities they serve; and so that we can engage in more effective **collective learning** about how to achieve impact together.

Open and Trusting Grant-making, then, is *not only* about foundations valuing and respecting the time, expertise, and judgement of charities. It is also about nurturing relationships:

- That respect the expertise, time, and agency of funded organisations
- Where charities feel invited and safe enough to challenge the thinking and assumptions of the foundation as part of collective learning
- Where foundations behave in a trustworthy manner as an ally and partner in effective and equitable social change

¹ Since its founding in 2014, the [UK Evaluation Roundtable](#) community has worked with foundation learning staff to shift organisational practices, norms and mental models related to learning and accountability in philanthropy, so that they are a better match for the realities of complex social change.

² We use charities as a shorthand for all kinds of social sector organisations, from unincorporated community groups to social enterprises.



A working definition of trust-based learning

Trust-based learning is a learning process that sees charities and funders as equal partners in building collective wisdom to advance equitable and effective social change. It:

- Values the perspectives of charity staff as experts
- Reduces foundation-driven demands on charities' time
- Protects funded organisations' agency and flexibility
- Addresses questions that matter to charities
- Diversifies the range of information brought to the table
- Is grounded in reciprocity and mutualism



Six perspectives of trust-based learning

At the Roundtable convenings, we heard directly from charities and foundations about their experiences of trust-based learning: meanings; benefits; conditions; challenges; and ambitions.



Learning in the mess



Learning for me is always in the messy bits: I always learn when things don't go well or when things go wrong. So, trust-based learning is trusting that there will be 10% of mess in anything that you fund, at least. And the trust is not being penalised for that. Because I'm very good at storytelling. So, I can write you a report or tell you about the project without telling you about that 10%, if I think I'm going to lose the money or not get funded again.

And having a relationship is at the heart. It's really important that funders buy into what we do, not how we do it. Also, that they are responsive and accepting that things might not go to plan, but they still carry on with funding as they can see we're learning and see how we are using that learning. One of the things that helps that is if it's in both directions – so that funders, in return, talk about their own experiences of funding things that don't go well, and share what they have learned. In that way, the trust is flowing in both directions. We are trusting that we won't be penalised; and they're trusting in return that we won't sugar-coat everything.

Putting that in writing – that we understand that things don't go to plan all the time; we want to hear about the things that didn't go well – would make a difference. It would help get the messiness into the open and set the tone for the relationship and the approach to learning, which would then help you be more open with your reporting. Because the truth is, without the relationship (and the trust), and without being explicitly asked or encouraged, I'm not going to put in something negative. Without that trust, you feel less of a responsibility. You just fill in the form for this person and tell them what they want to hear. And that's no good for either side. That's just people telling you what you want to hear. And you've no real idea what's happening with that report, if it's being read, if it's being used.

Emma Pears, Chief Officer, SELFA (Skipton Extended Learning for All)



Learning to rethink risk



Trust-based learning is about respect and sharing power; about being adaptable and relevant by listening to our partners. By listening, we are respecting, and also understanding. Which means that you are each bringing something that is important, even though it might seem like it's unequal, because we've got huge amounts of money and our partners don't. But they're bringing something else to the table – they give us all the insights about what's happening in the community and are doing the actual work in communities. And we have seen real benefits. Our partners feel they can trust us more, they can be more open about their challenges and, feeling that we are more equal, they can also challenge us. And it's that which helps us think about how we can work together to achieve the ultimate goal of supporting communities.

Our commitment to being open begins with the application process: trust-based giving supports trust-based learning. We thought long and hard about the absolute minimum that we need in order to help us arrive at a decision. We are also collecting evidence and data from other sources as well. So for each one of us (Trustees), there's our reading, there are networks, there are courses and webinars that we go to. We use all of that to inform our thinking and decision-making. The rationale is, if we're not open, we will not be relevant, we will not be a meaningful grant maker. Having all of those insights enables us to be flexible, enables us to be adaptable and agile.

That principle really helped us when we decided to focus on Black-led organisations. All of a sudden, we were talking about risk. And we were starting to say: "well, they're a bit risky, because their income isn't as secure, or because they need some support from us as well". But we realised that if you're going to be open to learning – really letting different perspectives and ideas come into your organisation and into your processes – it will mean rethinking some quite well-established routines and frames for the work. And for us that meant rethinking risk and what our ideal model of an organisation should be. Because Black groups can operate in a slightly different way from that norm. They haven't had the resources, they're coming from a different place; a lot of them come from church based groups. And we need to be open to that, and what it means for our expectations and our processes. Learning – reflecting, debating, asking questions – is at the heart of that approach.

Tracey Fletcher, Chair, Peter Minet Trust



Keeping an open mind



Firstly, as a funder I do want to understand what difference we're making, because everyone does want to know whether they're making a difference. Second, I do believe that it is possible to learn from any kind of grant in an open and trusting way: if we're honest about what information we really need and how we plan to use it and, as a funder, we take on the effort of learning from the grants ourselves. So, I don't think being trust-based means handing over all responsibility for accountability and impact to the people you support. It's about recognising where your responsibility as a funder sits and doesn't, and what your role in understanding impact is, and is not. I don't think we need to let go of rigour, but we need to define what rigour means to us.-

That means working out what is an appropriately rigorous approach for you to take to understand what is making a difference and why. What is it that you want to find out and what's realistic for you to be able to know? That's where a long term approach can be helpful. Because you can say, okay, we're not going to look every year, we'll do it every three or five years. And then we're not just looking at our funding, we're looking at the wider context for the issues we support, because ultimately it's about how are you going to use your money and use it well? And if you're only looking at what you did, you're not looking at the bigger picture.

What makes me nervous, however, is wondering about what I'm not hearing. What am I not looking at? What criticism could you make of our approach? And how do I deal with that? Can we get someone who shares our goals who we're not funding or we're not working with, to come in and say what they think and challenge our assumptions? How will I know if we are making things worse? Our system is not currently set up to hear those messages. And maybe that's the reason why I wouldn't describe what we do as "trust-based learning" – because it feels like trusting is the opposite of sceptical; and being sceptical is really important when you're trying to keep an open mind on what's actually happening.

*Gina Crane, Director of Communications and Learning,
Esmée Fairbairn Foundation*



Trusting to learn as you go



Trust-based learning starts with an internal learning culture based on openness. Then building relationships with external stakeholders and nurturing those relationships. Being trusted has meant having a clear focus on purpose; being selective about applications for funding, building fantastic relationships; building credibility in the organisation – all through relationships focused on open conversations about what our priorities are.

Scotland is committed to systemic approaches to change. This has helped us work with funders on focussed community initiatives, for example around substance misuse, where we can actually look at how we support families to articulate what their needs are, and then reshape support around them in a way that meets those needs, as opposed to them having to react or fit themselves in to services that don't really fit. So, inquiry has been at the forefront of our conversations with funders. And for that to work – on both sides – the quality of relationships and conversations is really important. It's a learn as you go process.

Relationships are more difficult with local authorities. Arberlour's approach is to demonstrate how early intervention improves outcomes for children and families and saves local authorities money and reduces the number of kids coming into care in the first place. If you have a distressed relationship with your funder, then you will focus your attention on all the wrong things. You will focus attention on trying to placate the funder, or trying to give them the answers they need and squeeze into the boxes they provide. This leads to organisations just telling funders what they want them to hear. But how is that helping us solve complex social problems? Our best funders trust us to get on with the work. Those relationships are really respectful, trustful and trusting.

SallyAnn Kelly, Chief Executive, Arbelour



Trust for mutual benefit



Trust-based learning means there's a deeper level of interest, understanding and alignment between strategic priorities with our funders.

It's doing something together. We have long-term relationships which enable us to be really open. A relationships-based approach means there is no pre-setting of outcomes. Open and trusting funders often say: *"just give us your annual report"*, and then they use the information we've provided in their communications, so there is a cycle of sharing and learning. We also use our evidence base to support conversations and relationship-building to explore opportunities, so it's not just a case of just 'reporting' to funders.

Working shoulder to shoulder with a funder means you're doing something that fulfils the aims of that organisation as much as that fulfils the aims of ours, and that means there's a mutual benefit. The Scottish Government is in the process of incorporating the UN Convention on the Rights of the Child into domestic law, and one of the challenges that we keep coming up against is how we ensure the voices of our youngest children are being considered. We're doing a piece of research with support from one of our longer-term funders, who are brilliant, and they've brought other funders to the table, so working through them has made this work possible. So it's not just about going cap in hand and asking politely for some money, it's actually being able to do something where they can be invested in it as well.

One of the other benefits is that our longer-term funders are engaged in the work. They've come to events, or they've read the annual report, or they've watched the film that we've made and they're looking at the stuff that we're sharing on social media. This means you're not constantly having to explain the work again and again. All of it comes back to a 'communications, relationships and trust' mantra.

Rhona Matheson, Chief Executive, Starcatchers



Being trusted as well as being trusting



We are a research-led funder, so learning is important in informing strategy and what we fund. We're interested in tackling difficult issues and filling gaps, whether that be a specific part of an agenda that's not getting enough attention, or whether it's enabling a particular approach to be tried and tested. We base this on what we are hearing from grantees, and a whole mixture of other data, for example from sector partners or published research. And then, as we don't have an open application process, we need to understand that there's a good fit between our interests before we approach an organisation – because we don't want to waste people's time or raise expectations.

Further down the line, reporting helps us learn and deepen our understanding of the funded work. Our approach is flexible, and recently we've tried to have conversations more, alongside or instead of a report. What's most important is talking about reporting at the beginning of a grant. We know that we need to understand how useful the funding has been, how has it helped organisations deliver and draw out what's been successful or challenging. So we discuss the context for wanting a report and design an approach with the funded partner, agreeing loose questions about context and progress. And we're careful to not ask for more than we need, or for the experience to feel extractive or intrusive. The idea is that partners get to tell us about what's meaningful. It's important that we recognise that we're not the experts in an organisation's work, whether that be restoring rivers or delivering family support – they're the experts, they're at the coalface of the issues. If we can encourage them to share their learning, then that's valuable to us and them, because we can then ask: "*what are the sticky bits of that, and how might we help?*". And then bringing this learning back in to the foundation helps us to refine and improve what we do in terms of our processes and funding strategies.

We know there is an inherent power imbalance between funders and funded organisations. So being open to challenge and partners feeling able to challenge is an important trust indicator. As funders, we have a lot of freedom, so we also need to create some accountability for ourselves, so that we can be trusted: the idea of mutually beneficial relationships is central to this.

*Rowan Boase and Elaine Gibb, Partnerships & Learning Managers,
William Grant Foundation*



Messages for trustees: you may not be the expert here

At the ERT convenings, we invited learning staff from foundations to share their anonymous messages to their boards in relation to trust-based learning – surfacing the challenges that staff/board relationships present to this way of working:

- Acknowledge your power and be willing to give some of it up – you may not be the expert here.
- We can't do all your thinking for you: engage in the learning process; think about what you need to know and why. Lean into learning, you will be rewarded.
- Stop giving undue weight to the one conversation you happened to participate in this year.
- We should model the behaviour we expect of grantees.
- Work on trust between trustees and staff in order to role model to the staff and give them permission to develop trust with funded organisations.
- Put yourself in the shoes of funded organisations.
- Welcome staff and funded orgs into your space and make them feel comfortable.
- Make time to turn up to learning visits – good intentions are not enough.
- Don't ask me about impact, ask me what happens if we don't take more risks.
- There is more to life than cost effectiveness.
- Stop thinking about impact as only being short term and measurable at an individual level.
- Be clear about the difference between learning and accountability and the differences between need to know and want to know.



Commentary

In this final part of our briefing, we pair the conversations at the two convenings with our own analysis and sense-making in order to offer some reflections about how to move towards more trust-based learning between funders and funded organisations.

Introduction

Collective learning requires making our thinking visible, inviting contestation, and wrestling with alternative perspectives to gain new insights together. Without this, it is impossible to build sufficient shared wisdom and align our efforts to address complex, entrenched problems. This kind of collective learning can only occur amid open and trusting information flows that are candid about the messiness and uncertainty of social change.

Yet charity/funder information flows are often experienced by charities as '*excruciating, extractive, and a distraction from the funded work*'. In the absence of trust, these information flows understandably become performative bureaucratic exercises that waste the time of the charity and provide little actionable insight to anyone. The norms and practices that shape these information flows are part of a vicious cycle as they both cause and are caused by a lack of trust. How might we shift our learning practices to help cultivate trust, and how might improved trust, in turn, deepen our collective learning?

What does it take to create the conditions for trust-based learning?

Trust is a **reciprocal** relationship that requires predictability or consistency of behaviour, transparency, and goodwill (defined as not taking advantage of the other actor for one's own benefit at a cost to them). The power imbalance between charities and funders that distorts these conditions cannot be eliminated, but we can manage it in ways that open up channels for more robust learning. The Evaluation Roundtable dialogue generated six key insights and concrete ideas about how to create the conditions for more candid, reciprocal learning that benefits everyone, including:

Communicating with transparency about information use and candour about decision-making

Always be transparent and clear about what information will be used for, by whom, and when. This includes being truthful about who has control over grant-making decisions, what factors and information influence those decisions, and how the foundation's priorities or understanding of the problem and solutions are evolving. We heard from the panel that charity leaders do not need to be protected from the reality that funders come and go. Instead, in order to make smart decisions about when, with whom, and about what to share candidly, they need transparency about how the information they share will be used for which decisions inside the foundation.



Respecting charities' boundaries

Reduce or eliminate extractive ad hoc information requests with last-minute deadlines. Remember that you are one among many funder relationships the charity needs to manage. Ad hoc and extractive requests from individual staff can at best be experienced as disrespect for charity staff time and mission and, at worst, as an abuse of power. This reduces the likelihood that charities will feel comfortable and inclined to engage with the foundation as a real thought partner.

Actively engage with information

Charities frequently experience foundations as 'black holes' into which their ideas, reporting, and feedback disappear. Respond to information that is provided by charities at your request – including via formal reporting – or do not ask for it. Engagement should include communicating how their insights might challenge or add nuance to *the foundation's* understanding of the problem, potential solutions, and its own role in supporting effective social change work. This demonstrates that foundations value and take seriously the perspective, feedback, and time of charities.

Develop routines for charities to challenge *the foundation's* strategic ideas and assumptions

Trust is fundamentally based on reciprocity and mutualism. Yet there are few circumstances where foundations' thinking and strategic choices can be contested. The power imbalance makes it unlikely that charities will challenge foundation ideas. In some cases, this may happen simply by staff asking charities for guidance and feedback on how the foundation understands the nature of the problem or on the strategies they believe will work to solve it. But more likely, charities will be unable to do this until *after* the foundation has established the reputation of being open and responsive to critique. Funders must find creative and safe ways to elicit this feedback, not only on how well a foundation supports its grantees (the most common form of grantee feedback), but also on the foundation's larger assumptions about the problem, about how change happens, and about which kinds of solutions and actors to invest in.

Explicitly cultivate behaviours and standards among staff that demonstrate trustworthiness

Roundtable participants emphasised the importance of humility and respect for charities' expertise as a fundamental condition for trust-based learning. Foundations must behave in trustworthy ways if charities are going to trust them enough to share uncertainties and foibles. Yet 'be humble' can easily turn into an empty gesture – it's difficult to see how to purposefully build a culture of humility.

However, we hypothesise that the behaviours above should be set as an explicit expectation or set of standards for staff interactions with charities or any other partner.

Consider shifting ownership of collective learning spaces to someone else

A theme of the Roundtable that proved difficult to untangle was the question of 'collective learning' across a whole system of actors who share common purpose. Instead, the conversation zeroed in on the 1:1 charity-to-foundation learning relationship.



Inherent in this level of focus are concerns about disproportionate power, extractive practice, and performative information sharing. However, if foundations could instead resource other field actors, such as infrastructure organisations, to support field-wide learning that is shaped by charities, foundations might be able to benefit as participants and co-learners rather than extractors of learning for their own bespoke systems.

How can we attend to the risks of trust-based learning?

Roundtable participants also surfaced two significant risks associated with trust-based learning that need further thinking and strategies for mitigation:

Implicit bias

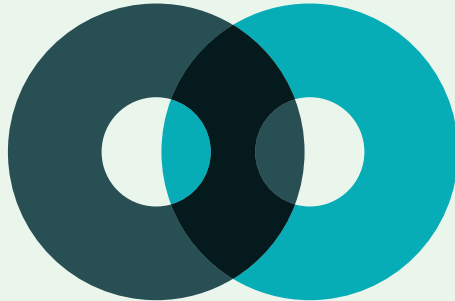
Most importantly, trust-based learning – as well as open and trusting grant-making in general – might drive foundations to work exclusively with those who feel ‘safe and familiar’, leading to the exclusion of new entrants, organisations whose form is less familiar, and organisations who don’t have a track record that fits into our conscious or sub-conscious assumptions about what a track record should look like. This has considerable equity implications, with organisations led by and serving historically and structurally under-resourced and excluded communities being at the biggest disadvantage for accessing trust-based funding. Funders embarking on a trust-based approach to both learning and grant-making must build in mechanisms for expanding their staff and board’s view of the ecosystem and regularly bringing new thinking and relationships into their work.

Swamp charities’ time with learning and engagement

Another possible risk, or perhaps a misconception, is that the open and trusting approach necessarily requires high engagement. Some charities have reported that foundations shifting to emphasise learning rather than command-and-control oversight is better in spirit, but can easily become just as extractive and demanding. Grantees find themselves spending hours in deep learning conversations, events, and cohorts with multiple individual funders. It’s important to consider the kind of interaction that’s truly required – with a premium on being *proportionate* and useful – and to look for opportunities to collaborate on more collective rather than funder-driven learning.

Trust-based learning is an effort to move toward collective learning practices that build on the distinctive expertise and perspective of both charities and funders in a more equitable and mutually beneficial way. It aims to protect the agency and agility of charities to respond to the evolving needs of the communities they serve. Rather than learning practices that serve the needs of individual funders – often at the expense (literally) of grant recipients – trust-based learning aims to reposition charities and funders as *partners* who learn alongside each other in service of achieving shared goals.

Trust-based learning is not a straightforward endeavour. But as we explored in the introduction, it is an important route to achieving effective and equitable social change. We take heart from how many funders are engaging seriously with the question of how to do it well. And we will continue to work with you, as partners in service of the open and trusting movement.



For more information and resources, please visit:
<https://www.ivar.org.uk/learning-and-evaluation/>



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