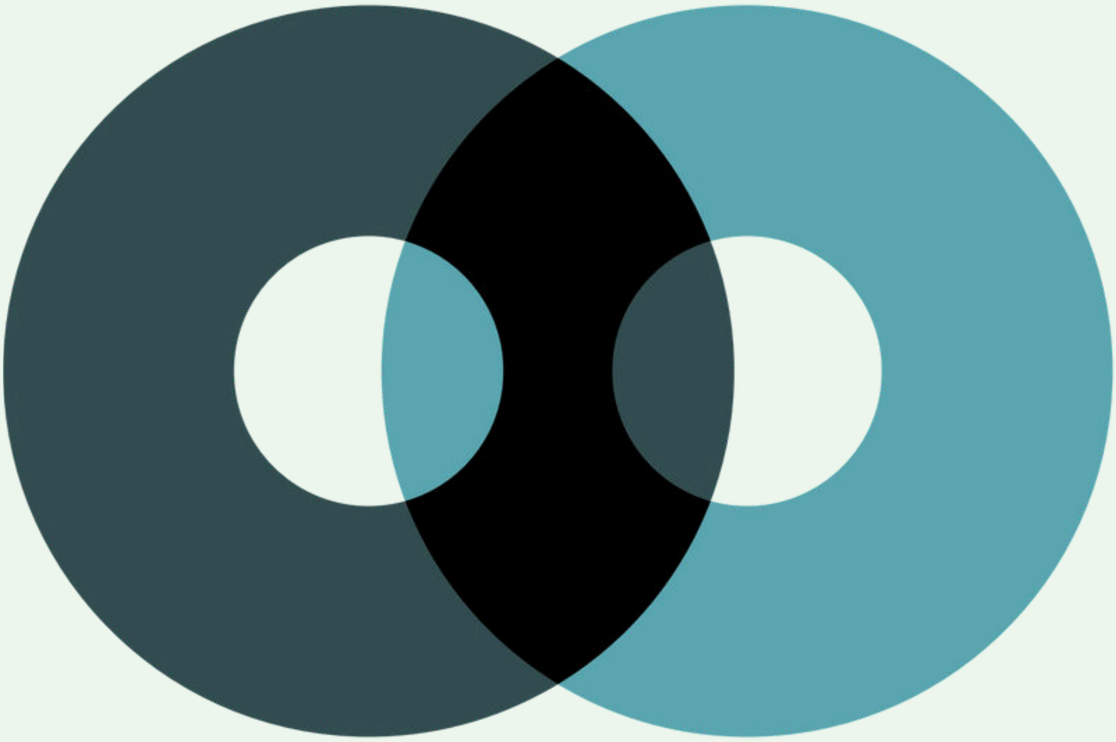
we listen, and learn together



Trust-based learning: embracing collective wisdom

Evaluation Roundtable Convenings
February 2026

Supported by:

GOOD INVESTMENT

Contents

Agenda

London: Tuesday 3rd February, 9:30-17:00, followed by drinks
Edinburgh: Thursday 5th February, 9:30-17:00, followed by drinks

09:30 – 10:00 Registration & Settling in
10:00 – 10:35 Welcome, Opening reflections & Introductions

Part One: Changing the Conversation: Assurance vs. Uncertainty

10:35 – 11:45 Interview and Q&A with The Robertson Trust and Carnegie UK
11:45 – 12:05 Comfort break
12:05 – 13:00 Small group discussions and plenary
13:00 – 14:00 Lunch

Part Two: Cultivating Trust-Based Learning relationships with Grantees/Partners

14:00 – 14:30 Introduction
14:30 – 15:10 Interview with The Robertson Trust and input from The Maitri Trust
15:10 – 15:45 Small group discussions
15:45 – 16:05 Comfort break
16:05 – 16:30 Plenary and synthesis
16:30 – 17:00 Takeaways and closing reflections
17:00 Drinks

UK Evaluation Roundtable 2026: Framing Brief

The February 2026 Evaluation Roundtable will continue our exploration of trust-based learning, with a specific focus on enabling learning across roles: between charitable organisations and foundation staff, between foundation staff and boards, and among foundation staff playing different roles. Our ability to achieve impact requires us to bring together wisdom from these multiple perspectives so that we can understand more fully the social challenges and systems within which we work.

- **Funders** need to learn from charitable organisations, who bring deep wisdom about the realities of the communities and contexts in which they work, what it takes to implement the work, and how strategies play out on the ground.
- **Charitable organisations** can benefit from the insights of foundation staff whose role enables them to see patterns in the challenges and successes of many different organisations working in different ways on similar issues.
- **Foundation boards** need strategic intelligence from staff and charitable organisations as they make decisions about strategy and resource allocation from a perch that is often some distance from the work.

Ideally, the learning between these roles should be candid and connected, so that decisions and actions through the whole chain are better aligned and built on shared understanding of what it takes to make change happen. Yet this is no easy task. Each of these roles encompasses different responsibilities, levels of granularity, learning needs, and time cycles, and involves different levels of comfort with uncertainty and mental models about impact. It can be very difficult to translate insights relevant at one level into insights that are actionable at another, particularly in light of limited bandwidth and budgets for learning. And, as always, learning across levels is impeded by the inherent incentives for charitable organisations to avoid candid discussion of challenges and disappointments with foundation staff, and for foundation staff to do the same with their trustees.

Three case examples will give us an opportunity to examine what conditions and approaches make learning possible between foundation boards and staff, between foundation staff and charitable organisations, and across foundation staff teams *in a way that can also be useful to the other roles*.

For example:

- **How do we focus learning in a way that is inclusive of the needs of multiple roles, and draws out insights that have meaning and are actionable for everyone?**
- **What kind of effort is required for foundation staff to bring wisdom generated by funded organisations back into the foundation and incorporate it into foundation strategy?**
- **How might conventional reporting processes and products − from funded organisations' reports to internal dashboards − be reimagined so that they provide more learning value across all roles?**
- **How can we support and prepare trustees to engage meaningfully with the insights coming from staff and funded organisations?**

The attached pre-readings include specific examples of: an internal impact and insights framework intended to meet the needs of staff, board, and charitable organisations (The Robertson Trust); a deliberate and staged transition to a culture of continuous learning governance to support full engagement with trust-based learning across the organisation (Carnegie UK); and a convening that is responsive to the learning needs of both funded partners and the foundation itself (the Maitri Trust).

At the Roundtable, we will think concretely and pragmatically through how to craft powerful questions and insights, how to translate insights across audiences to set up productive sense-making and 'now what' conversations, and how to prepare for a trust-based learning exchange between foundation staff and boards, and between charitable organisations and foundation staff. Please read the cases closely and come ready with your own questions, dilemmas and insights.

Balancing assurance and agility: The Robertson Trust's Impact & Insights Framework

The Robertson Trust is one of Scotland's largest independent charitable foundations, with a commitment to spend an average of £30 million each year to prevent and reduce poverty and trauma. For much of its history, the Trust operated as a responsive funder, awarding a high volume of relatively small grants across a diverse range of charitable organisations. Its approach to understanding impact reflected this model. Learning was primarily relational and process-oriented, drawing on grant-holder reports, surveys, and ongoing conversations between staff and funded partners.

The adoption of a new 2020–2030 strategy marked a turning point. The strategy articulated a desire not only to fund good work, but to contribute more deliberately to shifts in the conditions and systems that shape poverty and trauma in Scotland. At the same time, the Trust was affirming a commitment to Open & Trusting grant-making (O&T), with a growing share of unrestricted grants reflecting a belief that impact increases when funders back organisations, not just projects. These two shifts together raised new questions for trustees and staff alike: how could the Trust understand whether it was making a meaningful contribution to change that was complex, long-term, and shaped by many actors? What kinds of evidence were appropriate, given its commitment to the principles of O&T? How might it balance accountability for impact with its need to learn candidly together *with partners* about how to navigate uncertain social change?

FROM: The nature of the challenge

Learning practices within the Trust had developed organically over many years, providing valuable insight into how funding relationships were experienced and how grants were being delivered. Over time, however, these practices proved less well suited to the Trust's evolving ambitions. As the Trust began to look beyond individual grants towards questions of prevention, structural drivers, and long-term change, it became clear that existing learning practices struggled to illuminate how change was unfolding across the wider system. Board agendas, focused largely on governance, left limited space to step back and consider patterns, emerging system dynamics, or strategic implications.

Central among the Trust's challenges was the question of what constitutes credible evidence in complex systems. Trustees brought a wide range of professional backgrounds to their role. Some were accustomed to environments where performance indicators and quantitative metrics provided clarity and confidence. Others had spent their careers working in contexts where progress was incremental, relational, and shaped by forces beyond any single organisation's control. These perspectives were not necessarily in opposition; rather, they reflected different ways of understanding accountability, each grounded in a shared commitment to results:

> *'We all want to know whether we're really making a difference. We just come with different instincts about what evidence gives us that confidence. I wasn't looking for more data. I was looking for something that helped me understand whether we were learning as we went.' (Trustee)*

A second challenge was how to balance this desire for evidence and accountability with the need for learning to help the Trust and its partners navigate the uncertainty inherent in social change. Performance-based reporting conversations in the board room tend to incentivise polished and falsely certain portrayals of progress while discouraging staff from sharing real challenges and strategic uncertainties. Board members experienced these conversations as unsatisfying, with insufficient material to support a meaningful governance role. The same pattern was occurring between funded organisations and staff. Despite receiving good information from grantees, reporting rarely gave staff insight into how to achieve results in a complex and changing context:

> *'We knew we were gathering good information, but nothing tied together in a way that showed what was happening across the system. We wanted something that helped us see patterns, not just activities.' (Staff)*

TO: The goal of the Impact & Insights Framework

To tackle these challenges, the Trust created a new role titled Head of Impact & Insight, appointing Zoe Ferguson to the position. Ferguson was charged with developing a more intentional framework and approach to evidence-informed organisational learning and accountability − a framework the Trust calls its Impact & Insights Framework (IIF).

The IIF aims for a more coherent approach to learning − one that can hold multiple forms of evidence, support adaptive decision-making, and meet trustees' needs for assurance without oversimplifying the work or adding more burden for funded organisations. Most importantly, the Trust wanted a system that would help it learn *with* partners and across staff and trustees in a trusting way and increase the capacity of each role to contribute to change more powerfully from its own vantage point and position.

What the Robertson Trust tried: A framework to support accountability for results-oriented learning

Early efforts to develop an IIF focused on conceptual models that mapped different types of evidence and levels of impact − not unlike an outcome framework but underpinned by diverse evidence types rather than a defined set of quantitative indicators. While different iterations of an initial framework were intellectually sound, they did not resonate with trustees. The abstraction made it difficult to see how the ideas would translate into governance practice. Some trustees were worried that they did not see a clear set of measurable outcome targets and performance metrics in the framework:

> *'The board didn't need a diagram – they needed to see a real example. When you're accustomed to a constrained set of KPIs, it's too difficult to imagine conceptually how "diverse evidence" could give you sound conclusions for governance decisions.' (Trustee)*

In 2023, the Trust undertook a high-intensity impact and insights synthesis exercise as its first practical application, drawing together evidence from across its entire portfolio in an attempt to describe overall impact and draw out critical lessons. Rather than reformatting funded organisations' reporting expectations to roll up into the foundation's own framework as many funders do, the team decided to take on the work of synthesis and meaning making:

> *'The turning point was realising we didn't need more data – we needed a better way to work with what we already had.' (Staff)*

The Learning team compiled data from grantee reports, evaluations, and external evidence scans to create impact descriptions and identify patterns and notable learning across all areas of the Trust's work.

Following its first effort, the team was supported by Ben Cairns at IVAR to conduct an After Action Review (AAR). They reflected together on how well the IIF achieved what it intended. The AAR revealed that this initial effort required significant time and energy, but the result felt too broad and insufficiently grounded or specific to support strategic discussion. Trustees found it tricky going deep to grapple with difficult dilemmas. Rather than offering clarity, it reinforced a growing realisation: learning at the scale of the Trust's ambition could not be achieved through broad aggregation.

Out of this initial experience emerged a different approach. Leadership and trustees agreed to pilot a more focused, thematic model for one year across 2025. Instead of attempting to capture everything at once, the Trust would explore one strategic theme at a time through a structured quarterly cycle, informed and adapted each time through a disciplined AAR.

The quarterly cycle has now become the backbone of the Impact & Insights Framework. Each cycle begins with a **synthesis of existing evidence** − grant reports, staff knowledge, lived-experience insights, and relevant external research − curated and interpreted initially by the Learning team rather than aggregated. This synthesis is then tested and enriched through a **collective sensemaking session** that brings together grantholders, people with lived experience, staff, trustees, and external experts in person for a full-day discussion. **Internal reflection sessions** follow, allowing staff and leadership to refine insights and identify strategic questions before a thematic **Impact & Insights report** is produced for the board and then used as the centrepiece for a strategic board learning conversation. A public-facing version of the IIF is also made available on the Trust's website to share takeaways more broadly. (An example of the publicly available report is here. A more detailed description of the IIF and the process used to create it each quarter is available at the end of this case.)

> *'The quarterly rhythm gave us a heartbeat. Before that, learning felt ad hoc.' (Trustee)*

What results the Robertson Trust is seeing (both exciting and challenging)

The IIF process has proved thus far to be disciplined without being rigid. It created a predictable rhythm for learning while remaining flexible enough to respond to emerging questions:

> *'The framework gives us clarity without pretending the system is simple.' (Staff)*

Crucially, it strengthened insight generation without introducing new reporting requirements for grantees. Responsive funding grantees report on their own outcomes in the language and frame that works for them rather than being forced to report in a preferred format. The Trust does, however, place an expectation of external evaluation on their larger scale Programme (system change) Awards where these are test and demonstration projects, and the findings from these evaluations are integrated into the IIF as well.

As the pilot cycles unfolded, several shifts became visible across the organisation. For trustees, the thematic reports and accompanying discussions offered a different kind of clarity. Rather than asking whether individual grants were successful, conversations now focus on patterns across the system, the conditions shaping progress, and the Trust's role within a wider ecosystem of change:

> *'The conversation in the board room has shifted from "show us the impact" to "what does this mean for where we go next?".' (Trustee)*

Although there is still some healthy tension, trustees with different preferences for evidence have found some common ground: those drawn to structure appreciate the discipline of the cycle and the coherence of the reports, while those attuned to qualitative learning value the contextual depth. Staff and some trustees are thinking carefully about how to hold this common ground over time as the composition of the board changes.

Internally, staff report a shift from reporting on activity to engaging in shared inquiry. The regular rhythm of the IIF cycles has created space for interpretation and reflection, helping teams to feel more confident in navigating uncertainty and articulating emerging insights. The team feels that learning is becoming something the organisation *does together*:

> *'Sensemaking helped us test our assumptions with the people closest to the work. Closing the loop meant we were finally using learning, not just collecting it.' (Staff)*

Funded partners are experiencing the framework differently as well. Participants consistently describe the collective sensemaking sessions as generative and distinct from typical reporting interactions. By separating learning from funding decisions and focusing on what people are collectively seeing as points of traction, points of challenge, emerging opportunities and blockers, the Trust created space for more candid reflection on challenges, adaptations, and system pressures. Feedback from participants included:

> *'This was the first time a funder asked us to help interpret the system – not just report to it.' (Funded partner feedback to Trust staff)*

Perhaps most importantly, the Trust has begun to develop a more realistic understanding of its own contribution. IIF reports include case study examples which make visible the Trust's grant as a share of organisational income (typically around 10% for unrestricted grants, which comprise the majority of the Trust's giving, and significantly less with larger focused/restricted Programme Awards). Seeing its funding alongside that of others, and in relation to the broader system, helped staff and trustees alike to situate the Trust's role more clearly. This perspective did not diminish ambition; instead, it grounded expectations in how change actually happens.

What the Trust has learned along the way

As the Impact & Insights Framework has taken shape, the Trust has begun to develop a more settled understanding of what it means to learn credibly in the context of complex social change. Rather than producing definitive answers, the framework has helped staff and trustees clarify the kinds of questions worth asking, the role the Trust can reasonably play, and the forms of evidence that best support good judgment.

One of the most important insights has been the importance of developing a more grounded, shared understanding of the Trust's role within a wider ecosystem of change. Through the IIF, trustees and staff have increasingly recognised that progress on poverty and trauma prevention emerges from the cumulative efforts of many actors − communities, frontline organisations, public systems, and multiple funders − each contributing in different ways. Early discussions that implicitly sought attributable impact placed unrealistic weight on the Trust's role and risked narrowing the conversation about evidence. Those unrealistic expectations also reinforced the performance culture in the board room, leaving limited appetite for candid reflection.

By reframing learning and evidence around contribution − and making visible the many other factors contributing to change beyond the Trust's and partners' work − the Trust has been able to focus on how its funding, relationships, and convening power strengthen the work of partners, rather than attempting to claim outcomes that rightly belong to the system as a whole. This shift has supported a more proportionate and credible understanding of accountability, without lowering expectations for rigour. It also helps focus the learning on levers of change that are within the Trust's power to pull:

> *'The reports help me see the forest, not just the trees. It's clearer now where we fit – and where we don't.' (Trustee)*

The way learning is brought into governance has also proved to matter as much as the substance of the evidence itself. Trustees engaged most constructively when learning was given time and prominence on board agendas, positioned as an opportunity for inquiry rather than simply for review. In these moments, meeting design became a strategic intervention in its own right. Clear role definition − staff curating and interpreting evidence; trustees involved in sense-making sessions with funded partners and external partners helping to bridge between grounded insights and the higher-level strategy questions; and all trustees probing meaning and implications − helped reduce defensiveness and created space for curiosity. Over time, this clarity supported more generative conversations, even among trustees who brought different instincts about metrics, narrative evidence, or assurance:

> *'When learning is first [or more prominent] on the agenda, the conversation is completely different.' (Staff)*

Staff have learned that repeated cycles of synthesis and sensemaking help to normalise ambiguity as a feature of systems work rather than a failure of analysis. The regular cycle creates growing confidence in articulating hypotheses, surfacing tensions, and naming what remained unclear − supported by leadership's consistent reinforcement that insight, not certainty, is the goal. Relatedly, the guarantee of a full year for staff to experiment with this framework helped.

The inclusion of grantees and lived-experience partners and, more recently, policymakers and other practitioners in collective sensemaking, has further deepened the quality of insight. By deliberately separating learning from assessment, the Trust created spaces where participants could speak candidly about challenges, failures, and contextual pressures. These conversations surfaced dimensions of system dynamics that formal reporting rarely captures. Careful structuring of the space − including small but thoughtful power-balancing features like first-name-only nametags, as well as bigger design considerations such as focusing the conversation on what people are observing about the system rather than on the progress or work of any single organisation − has proved critical for candid and generative conversations rather than performative ones.

Trustees who participated in these sessions noted the value of hearing directly from partners, not as subjects of evaluation but as co-interpreters of change:

> *'As a trustee, these sessions help me feel the texture of the work, instead of abstract themes I understand more about the lived reality. This gives me more confidence in the framework as a whole. I'm also better able to share with other trustees [who did not attend the session] my observations and understanding. So it doesn't rest only on the shoulders of the staff to make sense of things.' (Trustee)*

Finally, the Trust has learned that insight alone is not enough. Each cycle generates more understanding than can be acted on at once. Over time, staff and trustees have begun to focus more deliberately on prioritisation − distilling a small number of consequential questions from each cycle that warrant governance attention. This discipline has helped to ensure that learning informs strategic posture without forcing premature decisions, allowing the Trust to remain responsive while maintaining focus.

Looking ahead: Ongoing challenges and dilemmas

The Trust is currently focused on refining, stabilising, and embedding its IIF approach, continuing to build comfort with the inherent uncertainties of social change, and building tighter connections to ongoing strategic adaptation at both the staff and board levels. This includes:

1. **Right-sizing scope and effort.** As the Impact & Insights Framework becomes more embedded, the Trust is now confronting a new set of challenges that reflect the maturation of its learning practice. One ongoing tension lies in sustaining the depth and quality of insight without allowing the framework to become overly complex or resource-intensive. There is a shared awareness that the very discipline that gives the IIF its value could, if left unchecked, risk reintroducing burden or formality that undermines openness. As one staff member said, *'The risk now is slipping into old habits − more data, more reporting, less learning'.*

2. **Connecting insights to action.** Synthesized data and insights do not always include definitive guidance about what to do next. Determining when an insight warrants a strategic shift, when it signals the need for further inquiry, and when it simply reflects enduring system conditions remains a live dilemma. For some staff, the IIF process can still feel somewhat disconnected from their own team's work plans, and perceived as being more for the benefit of trustees. There is more work to be done to integrate the IIF process into staff-level strategic decision-making.

3. **Stewarding through turnover.** The relational foundation of the IIF requires ongoing care. Collective sensemaking depends on trust, psychological safety, and clarity of purpose − conditions that must be actively stewarded as participants, staff, and trustees change over time. These challenges do not point to flaws in the framework itself; rather, they reflect the ongoing work of sustaining a learning organisation. For the Trust, the task ahead is to continue balancing assurance with agility, clarity with complexity, and strategic intent with humility, as learning remains central to how it understands and enacts its role in social change.

How the Impact & Insights Framework Works in Practice

The Impact & Insights Framework (IIF) developed gradually as the Trust sought a learning approach that could keep pace with the complexity of its strategy. Rather than beginning with tools or templates, the framework emerged through a series of practical questions: how to make better use of existing knowledge; how to surface patterns across diverse work; and how to support governance conversations that were both rigorous and realistic.

As one member of the Learning team reflected, *'We already had the information − we just weren't learning from it systematically'*. The IIF was designed to change that.

Building from existing knowledge

A defining feature of the framework is its reliance on evidence the Trust already holds. Grant-holder reports, midpoint conversations, staff observations, lived-experience input, and external research and data all form part of the learning base. Rather than asking partners for more data, the Learning team focuses on curating and interpreting what is already available.

This choice was both practical and principled. It reflected a desire to reduce the burden on grantees, while also recognising that insight in complex systems often comes from connecting existing signals rather than collecting new ones. As one staff member put it, *'Otherwise you just end up with lists of activity, and that doesn't really help anyone make better decisions'.*

The team approaches this material interpretively. Evidence is reviewed for recurring themes, pressures, adaptations, and divergences. Attention is paid not only to what appears frequently, but also to what stands out or contradicts expectations. Early insight statements are drafted as hypotheses rather than conclusions − intended to be tested, challenged, and refined through dialogue.

Learning at the level of the system

Another foundational design choice was to shift the unit of learning beyond individual grants toward system-level patterns. This meant asking different kinds of questions: What conditions seem to support or constrain progress across organisations? What pressures are being felt widely? Where do organisations appear to be adapting in similar ways, even when working in different contexts?

Over time, this shift helped the Trust move away from implicit comparisons between grantees and towards a more holistic understanding of the environments in which they operate. Trustees and staff alike began to see how individual organisational experiences reflected wider dynamics − an understanding that supported more proportionate expectations of what any single funder could achieve.

Collective sensemaking as a core method

The most distinctive element of the IIF is the use of collective sensemaking sessions. These sessions bring together grantholders, people with lived experience, staff from across teams, trustees, and external experts to examine emerging insights collectively. The purpose is not consultation or validation, but shared interpretation.

Sessions are carefully designed to support open exchange. Participants are mixed across roles, first names are used, and the space is explicitly framed as non-evaluative. This design matters. As one Learning team member observed, *'People talk differently when they're not being assessed'.*

Trustees who participated in these sessions described their value in grounding previously abstract insights in lived experience. Hearing directly from partners about system pressures, trade-offs, and adaptations helped trustees understand not just what was happening, but why. One trustee reflected that these conversations made the patterns in the reports feel 'real rather than theoretical', strengthening confidence in the framework as a whole.

From sensemaking to organisational meaning

Following each sensemaking session, staff come back together to reflect on what they heard and how it reshapes their understanding. These internal conversations are a critical bridge between insight and action. Staff examine which early hypotheses were reinforced, which were challenged, and what new questions have emerged.

This stage of the process marked a shift in internal culture. Rather than feeling pressure to present certainty, staff increasingly felt able to name ambiguity and surface tensions. Leadership played a key role in reinforcing that uncertainty was not a weakness, but an honest reflection of the work. As one staff member noted, *'The framework made us analysts, not just collectors of information'.*

The thematic Impact & Insights report

Each quarterly cycle culminates in a thematic Impact & Insights report. These reports are deliberately concise and interpretive. They include a high-level synthesis of key patterns, contextual analysis, illustrative examples from partner experience, and a small set of strategic questions for the board. There is a full paper and a three-four page summary with key data, insights and questions presented visually.

The reports do not offer traditional 'recommendations' or claims of impact. Instead, they aim to provide sufficient assurance by showing how insights are grounded, how patterns have been interpreted, potential implications for the Trust, grantees, and other systems actors, and where uncertainty remains. This stance has helped trustees holding different preferences for evidence engage from a shared foundation.

As one trustee reflected after several cycles, *'The reports give us something solid to work with, without pretending we can measure everything'*.

Embedding learning in governance

The IIF is designed to be used, not simply produced. Board discussions focus on meaning and implications rather than approval or performance assessment. Trustees are invited to explore what the insights suggest about the Trust's strategic posture, what assumptions may need revisiting, and where deeper inquiry is required.

Over time, these conversations have become more generative. Trustees who were initially cautious about the approach have become more comfortable engaging with narrative and contextual evidence, in part because they have seen how it is generated and tested. As one board member noted, *'Once you've been part of the process, you trust the insight more'.*

Closing the learning loop

The final stage of each cycle focuses on closing the learning loop. Insights are shared back with staff teams, informing day-to-day practice, partnership conversations, and future funding considerations. With consent, the foundation shares grantee case studies and summaries of critical insights with all grantees, reinforcing the Trust's commitment to reciprocal learning.

Across cycles, insights feed into wider organisational processes, including planning, strategy refreshes, and reflections on the Trust's influencing role. The framework itself is reviewed and adjusted in light of experience, ensuring it remains fit for purpose.

A framework that continues to evolve

The Impact & Insights Framework is not a fixed model. It is a living system that continues to evolve as the Trust learns more about its own role and the systems it seeks to influence. What distinguishes the IIF is not any single tool or method, but the way it combines disciplined synthesis, collective interpretation, and governance-focused reflection into a coherent whole.

The Trust originally organized the IIF by issue: financial security, education and work pathways, and nurturing relationships. Recognising that systems-level changes on these issues will take time, the IIF will be reorganised through the lens of the 'pillars' in the Trust's three-year delivery plan: prevention, systems change, empowering communities, influencing, and capacity for social change across 2026. In addition, the board has set aside two half-day sessions for themselves in June and December to engage more meaningfully in the learning, strategic questions and implications.

In doing so, it offers one example of how a foundation can learn credibly and collaboratively in complex systems − maintaining rigour without oversimplification, and balancing assurance with the humility required when change unfolds across many hands.

Continuous learning governance at Carnegie UK

Carnegie UK is a policy-focused foundation dedicated to advancing collective wellbeing and achieving large-scale systemic impact by putting wellbeing at the heart of government decision-making across the UK and Ireland. While pursuing this extensive mission, the foundation operates on a relatively small scale. Its endowment is not enormous; its annual budget is limited, and it carries a low-risk profile because it is not delivering statutory services or financing critical services, functions or organisations.

The team acknowledges that attempting to achieve very big things in the world within these constraints requires an adaptive approach. The work itself is complex, non-linear, and based on a theory of change − that better policy decisions will follow if governments adopt wellbeing models − which contains big evidence gaps. Progress is consequently difficult to define.

The nature of the challenge

A critical element of Carnegie's approach is its position on 'impact' – which it understands as a multi-faceted process focused on achieving systemic change in how public policy is made and executed. Many actors are involved and the focus must therefore be on contribution, not attribution.

This ambition relies on collaboration and influence, striving to shift policy narratives and making a strong case for change so that − ultimately − officials begin citing or using Carnegie's perspective in their thinking and actions. Carnegie's unique role in achieving this scale of impact is facilitated by its financial independence, which allows the organisation to focus less on *proving* its value to external parties and more on continuously *improving* how it operates:

> *'The role of the foundation is to be the intelligent actor and convenor in this system, continually using feedback to improve our strategy, rather than attempting to prove our value through linear transactional models.'*

This theory of change does not lend itself to a traditional governance paradigm built around predictable inputs, outputs and KPIs.

In 2019, the CEO and Chair therefore identified a shared desire for changes in organisational governance: *'to review and modify board reporting processes and associated patterns of behaviour in relation to assessing impact'*. Although staff work was respected, the governance system and associated artefacts were symptomatic of low trust:

> *'Board papers were massive, KPIs proliferated, but very little of it really connected to the complex nature of the change we wanted to make.'*

This environment fostered anxiety, establishing an unwritten (and misplaced) assumption '*that the Board was only interested in stories of success and was unwilling to take and deal with the consequences of policy risk. It was not in fact a timid, risk averse Board that wasn't up to engaging with complexity, but there was a tendency for staff to behave as though it was'*.

Compounding this cultural dissonance was a structural challenge rooted in Carnegie's model of governance. For over a century until 2023, half of the board was drawn from a local grant making trust. This meant that half the trustee body often had no particularly strong background in, or affinity for, the work of a public policy foundation. This arrangement resulted in a board with highly asymmetric expertise in the focus of the Trust's work, which often felt like it was in search of a clear purpose.

In 2021, the executive leadership determined that governance needed a wholesale refresh, alongside a wider strategic review. The destination was clear: to move away from a board culture of 'low trust, asymmetry, performative reporting, and a sense of anxiety' to an approach described as 'continuous learning governance'.

The goal of continuous learning governance

The foundation defined its shift by framing governance as being *'continuous and generative rather than static and performative'*:
'The goal was to build a board that was more holistic, more curious, more constructive, and to harness the varied experience and perspectives of its trustees.'

The purpose of the board was redefined, non-traditionally, as:

> *'To review progress against aims, consider what has gone well and less well, and adjust the delivery of the strategy in the light of this intelligence.'*

This had the effect of refocusing accountability away from linear performance metrics toward shared reflection, allowing the organisation to move *'away from proving to improving'*. Since the foundation operates with its own endowment, the core priority became internal:

> *'Not to prove to anybody else that we're having an impact, but to focus on making that impact greater and better.'*

Consequently, the trustees' formal responsibility for programme governance has shifted to assuring themselves that the executive is learning about what it takes to achieve impact and is acting on that learning. This new purpose centres on the shared journey and the commitment to shared learning.

What Carnegie UK tried

The commitment to learning governance was embedded through intentional cultural shifts and practical structural reforms.

The first critical element was establishing the principle that trustees are experts in the strategy:

> *'This approach aimed to cut through the asymmetry on the board by levelling expectations and making clear to new joiners that you don't need to be a policy wonk, you need to be an expert in our strategy.'*

This provided essential coherence and purpose.

Secondly, to ensure the new learning approach was visible to trustees, the organisation changed its papers and meeting structure. Staff papers and the CEO report are now consistently organised as a reflective learning cycle: What/So What/Now What? This structure is fundamental, as the 'So what?' section forces reflection about what is being learned (rather than what has happened), and the 'Now what?' outlines how the findings contribute to the established strategic objectives for the work.

Thirdly, the board meeting agenda was reconfigured to embed shared reflection as paramount. A 'Shared Learning Discussion' now occupies the first hour of the board meeting, a sequencing that sends a message that it's the most important thing. These sessions often utilise small group work, mixing trustees and staff to *'kick the ideas around'.* For some, these are *'very rich and exciting conversations'*; for others they can still feel *'a little circular and random'.* More recently, these sessions have been used to share intelligence from the external environment, and the board agenda as a whole is framed around a process of strategic learning. In support of this, reflective 'Significant Moment Reports' (SMRs) are brought to the board at forks in the road.

Fourthly, the organisation also increased points of engagement outside the main meeting, including experimenting with the involvement of trustees in occasional 'Programme Assurance Meetings' and internal webinars.

The transition into this model relied heavily on building a specific culture:

> *'It required establishing mutual respect and being on a shared journey, where staff could share puzzles and throw ideas out without fear of being closed down. The model embraces the uncertainty inherent in systemic change, operating with the mindset that if you hit the edge or the side, or something goes wrong, well, then you learn.'*

How this has landed in governance at Carnegie UK

The implementation of learning governance has resulted in numerous benefits, primarily in fostering a healthier, more aligned organisation:

> *'Perhaps the biggest gain is that conversations now align better with our values and our understanding of how change happens, resulting in a system that feels congruent.'*

The board's reflection is framed around two key areas of enquiry: what has been learned about collective wellbeing, and what has been learned about effecting change?:

> *'In this uncertain space, trustees have embraced uncertainty, comfortable with stating: "I don't know, and I'm comfortable with that".'*

For some, the process has been successful at being generative; and the first steps have been taken to move away from positioning staff as experts and trustees as interrogators, toward positioning them as more equal in the sense of the listening and the hearing (albeit this remains a work in progress and, often, quite a struggle).

However, the shift away from traditional metrics has introduced challenges. There is a persistent anxiety regarding measurement, felt by some members of staff and some − particularly newer − trustees:

> *'A legitimate critique is that you can always be learning, but are you actually making any progress?'*

Without concrete data to the board about specific and tangible progress, *'there is a risk that staff and trustees just don't know if what we're doing is impactful or meaningful'*. Some new trustees find the current state unsatisfying.

This situation is exacerbated by the organic nature of policy programme development, where (by design) more tangible outcomes often only become clear as the work evolves. The initial phase of implementing learning governance also happened at a time when the whole organisation was in a state of flux, moving to a new strategic approach, with significant staff turnover and operational change on multiple fronts.

Furthermore, the model can be difficult for staff: sharing 'failures' openly can be challenging, especially for people less comfortable with learning out loud; and there is a risk that the conceptual frame is not yet sophisticated enough to really allow those more exploratory and expansive conversations to surface. Templates, even the useful What/So What/Now What? structure, can become rote, hardening into another ritual:

> *'The risk of slippage into new forms of performative behaviour is constant.'*

What Carnegie has learned along the way

Maintaining a dynamic learning model requires sustained effort. A core lesson is that intentionality is crucial:

> *'Leadership must provide the drumbeat of naming it and renaming it and reminding people what you're about to do because the whole approach can drift if it is not made explicit.'*

Conversations need to be actively anchored in the strategy:

> *'To ensure discussions are productive, they must be dragged back down to earth in a practical and pragmatic sense. We need to become much more focused on where the generative learning conversations happen (e.g. around the strategy route map) and not try to be too sophisticated with the rest of it.'*

A second lesson involves the nature of challenge. While the collaborative culture is strong, practice still lags a little behind:

> *'There's mostly just a random chucking of stuff on the table, some of it useful and interesting, lots of it not; and without sifting and prioritising this material, no-one really knows what has landed and what's not, and staff go away a bit confused.'*

So, despite progress, there remains a sense that the generative process needs to land somewhere: 'moving beyond lots of hot air to subsequent decisions about what happens next: trustees need assurance that there is substance to the learning discussion, that it lands somewhere'.

What Carnegie is grappling with now/anticipating next

The foundation is currently focused on refinement, seeking to solidify accountability and measurement without losing the generative benefits of the approach. Action is required in four areas.

1. **Refining Accountability**

'The crucial next shift is for trustees to focus less on their own learning and more on holding us [the executive] *to account for ours.'*

The goal is to move the board towards intelligently scrutinising the quality of staff learning, asking: *'what are we really learning, were the bets we placed the right ones, are we adapting well?'*. This focus on the quality of internal learning is viewed as a powerful corrective to performativity, *'because it is within our gift to control'*:

‘When we report to the Board (and indeed when we reflect internally), that is the opportunity to interrogate the signals from the past year’s activity – exploring learning questions around the receptiveness of the external environment; the kinds of conversations we have with policy makers; what seems to land and what doesn’t; what do we need to adjust for the year ahead?’

2. Balancing Measurement

The organisation is still searching for the right balance: identifying meaningful signals of change without slipping back into a culture of KPIs that measure busyness rather than progress. Approaches will vary depending on the nature of the work. The foundational Communications and Advocacy programme has started to develop a reporting approach which includes traditional metrics like reach and engagement rates, alongside ‘vibes-based’ metrics – like the nature and quality of engagement and what that contributes to in terms of outcomes.

While this approach offers a regular drumbeat of data, caution will be necessary:

‘There is a risk that the more quant nature of this data ends up bearing more weight than is helpful or appropriate simply because it’s more recognisable. However, the potential upside is that it offers a regular drumbeat of data.’

Other programmes will be associated with more qualitative data and more nuanced evidence of impact. Staff and trustees will need to become increasingly confident at identifying ‘the signals in the noise’ and learning together how these relate to the theory of change and actual impact.

3. Enhancing constructive challenge

While the culture is collaborative, some trustees feel a little bit powerless on influencing the programmes of work. There is a desire to introduce mechanisms, such as trustee-only time, to allow for harder feedback and to raise genuine issues of concern or doubt without staff present, but:

‘Caution will be necessary here too, so as not to establish a culture which implies that effective and robust challenge can only take place absent the relevant staff members.’

4. Clarifying decision points

'During board discussions, there is lingering ambiguity about whether a trustee's suggestion is a thing thrown in to see if it's helpful or whether it is something the board is actually saying staff ought to be looking at.'

This issue needs to be addressed, potentially through more structured summing up at the end of each item.

Furthermore, some trustees seek more formal decision gates where their strategic steer is instrumental in determining next steps. It will be important to negotiate these governance moments in ways that are aligned to the ways of working and phases of programme development; otherwise there is a risk that artificial decision points will be manufactured for the wrong reasons. Equally, it is important that trustees feel that they have appropriate opportunities to influence the development of work and can 'own' the key strategic decisions.

The commitment to learning governance is recognised as an evolving system. The success of the model relies on the ability of the leadership to manage the tangles and blurs that are inherent to this approach, continually identifying crucial moments for shared conversation and ensuring those interactions are not just ritualistic, but focused on:

'Strategic learning questions about progress and necessary adjustments in the light of experience and learning.'

You can read the Carnegie UK Trustee recruitment pack, as well as two board agendas (a year apart, which show different ways of approaching the collective learning session) here.

Trust-based learning with partners at the Maitri Trust

Based in Edinburgh, the Maitri Trust is dedicated to **improving primary education for children in India and South Africa**. Providing flexible funding, Maitri partners with changemakers who share their mission to unlock life-changing learning for every child. In November 2024, Maitri gathered with its South Africa partners in Cape Town to delve into the deep-rooted issues that face South Africa's education system and explore how, as a community of organisations with a shared goal, they can catalyse change together.

The nature of the challenge

As a learning organisation, Maitri has always created spaces for internal reflection and learning, with the team meeting regularly to share insights from narrative reports and conversations with partners. These are valuable sessions, informing decisions about what and how to fund. The board also plays a key role in internal learning, and over recent years Maitri has built in more opportunities for learning through reflective conversations at board meetings, often bringing in partner voices. Maitri has also prioritised board member and funder learning through partner visits, which have provided direct experience of work on the ground, further enhancing board discussions.

Learning activities were geared towards making the best possible funding decisions, but as an organisation with a strong belief in collaboration, Maitri wanted to explore how they could deepen learning with and between partners to bring about more meaningful change:

> *'Up until then, our learning had been very much about looking inward … Were we funding the right things? Were we working in the right way? But [we weren't] thinking about sharing our learning. And it occurred to us, well, actually, this could be really helpful for other partners, but also the sector.'*

In 2021, Maitri launched a survey of partners – the first comprehensive feedback survey for the organisation. The survey was followed by focus groups, bringing grantees from India and South Africa together. There was positive feedback from this process beyond the survey itself: partners said it was the first time they'd ever been in a space like this together, and they really appreciated it. This was a clear signal that partners wanted Maitri to help bring people together to share learning. For Maitri this reflective exercise also *'threw open a lot of areas of improvement when it came to learning and communication'*. In particular, how could Maitri amplify partners' work, and ensure that information flows better within the organisation, and between partners, as well as the wider sector. Maitri also saw an opportunity to deepen its understanding and engagement with the contexts in which partners are operating.

Aim: To learn differently with partners

Maitri had a longstanding ambition to bring partners together, but wanted to ensure that they had a clear mandate and that the timing, focus and format were right – the survey results and feedback from partners gave them this mandate. They wanted any convening they led to be intentional, to create a space to engage in genuine learning together and develop a deeper understanding of the opportunities and challenges faced when seeking to effect meaningful change across the education system.

Like many funders, the team at Maitri is exposed to a lot of learning that doesn't always get shared. This bird's-eye view allows them to see crossover and potential opportunities for collaboration that partners may be missing. Staff also hoped that convening partners would contribute to a greater sense of community amongst organisations working in the same space.

What Maitri tried: Convening partners in South Africa

The Maitri team were excited about the prospect of convening partners, but conscious of the need to genuinely respond to their interests and appetite – whatever they designed, they wanted it to add value. The team began a process of careful planning and preparation. Trustees played an essential role in the early design process, asking important questions about outputs and value, which helped staff articulate the intended benefits and focus of the event.

Staff were clear that the agenda should not focus on organisational updates − they were interested in the opportunities and challenges partners were facing, the barriers to collaboration and what would make time at the workshop useful for them. To ensure the agenda reflected this, organisations were sent a questionnaire well in advance of the workshop to assess appetite as well as potential topics. The result was that core agenda topics − government engagement, systems change, and wellbeing − were determined by partners.

The event took place in November 2024, involving two senior representatives from each of Maitri's 14 South Africa partners, Maitri staff and Maitri one trustee. The involvement of a trustee was crucial to provide first hand exposure and understanding of partners' work. A lot of consideration went into event logistics to ensure optimal conditions for attendees to feel relaxed and ready to engage openly and honestly. The venue choice (the Desmond and Leah Tutu Legacy Foundation offices in Cape Town) helped to set the right tone. All travel costs for partners flying to Cape Town were covered. An informal dinner held the night before helped to break the ice and build social connection.

The agenda was curated by the team in partnership with a carefully appointed local expert facilitator, described as *'one of the best decisions we made'*:

> *'She took the time to get to know Maitri, read the partner feedback to help curate well thought through sessions and was meticulous about everything from the tone of the day, right down to snacks!'*

Her facilitation plan, style and framing for the session created the *'perfect connection between Maitri staff and funded organisations on the day'*. She led with both knowledge and empathy, and the creative sessions appealed to different styles of learning. Maitri staff were intentional about how they wanted to show up. They were conscious of the inherent funder-grantee power imbalance. They already had strong relationships and a foundation of trust with partners, which supported *'a feeling of balance'* across the workshop. They actively participated in discussions, clarifying that they were *'not here to sit in the corner scribbling notes'*. Staff modelled vulnerability, clarifying they were in learning mode: *'Key for us was understanding on a deeper level the issues our partners are grappling with, as well as how we as a funder can support this work through responsive funding'.* This clarity about roles was intended to create a greater feeling of equity, which contributed to frank and open conversations on the day.

The day started with a warm-up where everyone reflected on their career paths and the enabling moments that had shaped them. It was light-hearted and got people talking. The second session focused on working more effectively with government and at scale, exploring the enabling forces driving progress − and the barriers. Feedback from the pre-event partner questionnaire demonstrated an interest in hearing about the work of others, so four organisations at different stages of their government engagement work and scaling were asked to be part of a panel discussion. Questions were carefully curated to get the most out of the panel and this set the tone for a deep and collaborative discussion.

The entire afternoon was dedicated to wellbeing, in acknowledgement of the challenging contexts within which organisations, and the individuals within them, operate:

> *'When you're working in an environment where you're dealing with and constantly surrounded by stress: you're working in really difficult situations, with children that are in schools that are not great; the frustration of dealing with governments, dealing with funders, all the rest of it! The pressure that creates on individuals and on teams!'*

Key to the success of the day was working with the facilitator to ensure the workshop reflected partner interests and needs without putting Maitri's assumptions − both culturally and as a funder − onto the agenda. Staff initially grappled with the idea of including wellbeing on the agenda, worrying that it might be seen as not formal enough; however, the facilitator assured them it would work well and it did. The discussion explored practical ideas like the Seven Types of Rest. People were surprised about the inclusion of this session, reflecting that no funder had ever asked them to discuss their own wellbeing before.

The atmosphere and the engagement throughout the workshop were described as *'vibrant'.* There was serious discussion, but also laughter and singing:

> *'We laughed. We sang. I mean, this is South Africa! There was a lot of joy, a lot of reflection and a lot of learning.'*

The day concluded with presentations, with each partner sharing a 'Rose, Thorn, and Bud', which included one challenge for Maitri. This mechanism ensured that Maitri received tangible feedback for future action. A visual illustrator captured the discussions, providing an accessible record people really appreciated and allowed Maitri to share information in a more creative and dynamic way. After the event, Maitri sought feedback from partners. They published a [blog, shared their insights from the day, alongside a short video](#).

What results Maitri are seeing

The workshop was definitely worth all the hard work and planning that went into it:

> *'It was the absolute highlight of … 2024 for everybody involved from Maitri's side. It was the most special opportunity to really engage with people.'*

It provided Maitri with more confidence to play a convening role in the future. The event and the subsequent learning were seen as an evolution of what was already happening at Maitri − more focused on shared learning with partners rather than internal reflection, and with more intention. It helped Maitri to strengthen a sense of accountability to funded partners and demonstrated a commitment to supporting partner-led learning and systemic change in the education sector.

The learning generated quickly filtered into the foundation's decision making:

> *'The workshop fed into our refresh of Maitri's theory of change and monitoring framework. The conversations about systemic barriers helped us think about indicators and partner engagement.'*

The discussions also gave Maitri clarity on a key strategic question about its role in government engagement, resolving internal grappling on the issue. The explicit takeaway was that Maitri's function is about *'supporting partners to do that work well'* and *'to elevate the work they're doing through our own communications'*, rather than Maitri trying to step into that role or space itself.

The relationships strengthened at the workshop enhanced trust, giving Maitri the confidence to share the new framework with partners and ask for honest feedback before rolling it out:

> *'It definitely challenged us and our thinking … And that's led to some changes, not directly, but it's informed some of our thinking in how we monitor and evaluate partners and also changes that are coming down the line in how we're going to be funding.'*

The convening allowed partners to discover crossovers in their work, whether grappling with similar issues, or working on similar initiatives or in the same spaces or schools. This presents Maitri with an opportunity to *'web the portfolio better together'* and leverage the impact of connections and crossover.

At the same time, several aspects of learning with grantee partners remain challenging for the team. While the wellbeing session was powerful, working in education in South Africa is extremely challenging and demanding, particularly for senior leaders. Partners have to manage the frustration of dealing with governments and funders, and the teachers they support often take on complex roles beyond education, acting as *'therapists and* *counsellors and housing association people, and poverty alleviation and domestic violence and drugs and alcohol counsellors all wrapped into one'.* The Trust continues to think about how it can support the kind of wellbeing the partners need and reduce the stress and burden of people's complex roles.

Although the workshop fostered a strong sense of community, a lot of goodwill, and opportunities for collaboration, Maitri recognises that the sector is a fierce place to work in, and the traditional funding model is at odds with collaboration. Maitri continues to consider how it can best support partners to meaningfully engage with each other.