

## Ken whit? Learning about funder learning

Evaluation Support Scotland (ESS) works with the third sector and funders so that they can measure and report on their impact and use learning to improve practice and inform policy.

**This paper is for Scotland funders.** It tells you about our Funder Learning Programme and its impact, and what we found out about funder learning.

**Background:** ESS has worked with funders since we started in 2005. Some key resources we've developed together are in **Annex A**. In 2012, we started running breakfast discussion events for funders. From 2014-18 a grant from The Robertson Trust has allowed us to run a **Funder Learning Programme** of events, training and resources for funder learning.



## What did we do?

Reach:

**53** different  
funders

**140** people

### ➤ Masterclasses (with short write ups or resources)

- Small and simple – evaluating [small grants](#)
- Evaluating [capacity building](#)
- [Adding up outcomes](#) (from funded projects' evaluation)
- [Evaluating together with funder organisations](#)
- Getting the best from [core funding](#)
- Funders' [online reporting](#)



### ➤ Funders Influencing Policy and Practice learning set

The Robertson Trust, Big Lottery Fund, Carnegie UK Trust, Inspiring Scotland, Life Changes Trust, Lloyds TSB Foundation for Scotland Partnership Drugs Initiative and the Voluntary Action Fund explored with ESS how funders influence policy and practice and how to evaluate influencing work. The group created [\*\*\*Walking the talk: A guide for funders on how we evaluate our policy and practice influencing work\*\*\*](#). It includes a logic model, evaluation tools and funder case studies.



We ran seminars and 1-1 sessions to help others funders use the guide.

## Funders and funded in harmony



This report from research and an event with funders and funded showcases improvements in funder / funded relationships and identifies the next set of challenge.

### Funder/funded relationship case studies:



[Building mutually beneficial relationships - funder and funded](#) – blog from Douglas Hamilton, the RS Macdonald Charitable Trust

### ➤ Other publications



From a mini programme of



From research on economic evaluation



### And not forgetting...

## FunderFest2016

Biggest event of its kind for funders, with presentation, discussions and peer support. Event report and blogs [here](#).



## What difference did we make?

### Headlines

- ✓ The most useful benefit for most funders was the **problem solving and learning together**.
- ✓ Most funders say they learnt something new and did something differently as a result of their participation in Funder Learning.
- ✓ Funders said ESS facilitated a trusted space for funders to learn from each other and, to a slightly lesser extent, provided new learning directly.

### **Evidence from our funder survey in summer 2017**

25 funders responded (just under half of all funders who'd attended events).

#### ✓20 funders learned something new

"Other people's experiences can provide insight or solutions that you haven't thought of or considered in sufficient depth"

"It was a good opportunity to discuss ways of working, challenges and resources available to support practice. The workshops are always very engaging allowing everyone to be involved and bring their experiences/ideas with them."

#### ✓16 funders are working differently as a result

"The resources available from the workshop and on the website have been extremely useful with my work. I use them regularly and direct colleagues to the website"

#### ✓ 8 funders changed a system or process

"We changed our evaluation procurement process; it now has a greater focus on the people doing the evaluation, how they will engage with our grantholders and participants"

#### ✓ 23 funders would recommend ESS events to others. Two were not sure.

Apart from wanting "more time", no funders identified ways the Funder Learning Programme could have been improved: "in some ways we need to take some responsibility for our own learning and putting it into practice - that is the hard bit though"

### **Other evidence of impact**

We also evaluated each individual event or mini programme. For example

- Our "getting the best from external evaluations" mini programme of workshops and the **Principles for Funders** resource: all the participating funders said they were using the **Principles** resource and that taking part in the mini programme had improved their commissioning practice.

- The online reporting workshop gave funders opportunities for practical problem solving and reassurance: “[I’m taking away] Lots of tips on what is possible on Salesforce and confidence that what we want to do is possible”.

**Walking the Talk learning set** gave participating funders a unique opportunity to work together on a common challenge and produce useful learning

“My fellow funders were very open to sharing - their experiences (good and bad), their learning, even resources.”

“Great combination of time/space to think/discuss/reflect with a practical focus (so we didn’t lose our way).”

“The facilitation by ESS has been fantastic - perfect mix of individual and group work. Well-structured and good balance of us doing work and ESS doing work. Created a lovely vibe and felt professional and productive, but also relaxed and enjoyable.”

However, the subsequent roll out of Walking the Talk was **not very successful**. ESS could have explained this better but we also discovered that many funders were not ready to evaluate their policy and practice influencing work and we found ourselves supporting them on basic evaluation rather than implementing this resource. Indeed, we found the number of funders who are doing influencing work is small and most are funding charities to take that role.

Overall the Funder Learning programme’s **biggest impact** was facilitating productive opportunities for funders to learn with and from each other. A [blog](#) by Janet Morton from BBC Children in Need about Funderfest sums up many funders’ views about the power of funders learning together. Extract:



“Of course funders already get together in many different permutations, however this was one of the most diverse groups of funders I’ve been a part of - established and new; small and large; statutory, independent and all shades in between - it was great to have the opportunity to connect, and the space to explore some interesting topics.”

## What did we learn?

1. Above all else, funders want to know that their funding is making a difference.
2. Funders strongly value the opportunity to learn together and share practical ideas. We heard regularly and consistently from people in funders (especially from more junior staff) that the Funder Learning Programme provided an opportunity they did not otherwise have outside their own organisation.

3. Funders were positive about all aspects of the Funder Learning Programme but some elements were more useful than others. We learned:
  - **Flexible responsiveness** was key: two of the more successful parts of the programme were the online reporting workshop and the external evaluation mini programme. These both emerged almost accidentally from funder conversations at other events.
  - **Less was more.** In the first two years we tried to run too many masterclasses. The funder community in Scotland is relatively small and people did not have the time for quarterly events.
4. Most of our events were for funders only. Twice we brought funders and funded together. Funders were nervous about this (!) but it worked extremely well in terms of sharing perspectives and co-producing products (such as the core funding guide). Our conclusion is that funders should learn on their own when they need a **safe space** to trouble shoot and get peer support. But it is better to learn with funded organisations for **mutual understanding** and to **produce materials** that will affect funded organisations.
5. ESS's role in the funder learning programme was often about expert support. However, our larger role was as facilitator. We got positive feedback about our skills in creating productive safe spaces and imaginative events. However, in future funders might think about whether they can sometimes self-facilitate their own learning.
6. Funders tell ESS anecdotally that they want evaluation training, particularly people new to the funding sector but funders don't sign up in their droves for ESS's core evaluation workshops (run separately from this programme and charged for). We had to find ways to incorporate practical learning into our events, and to generate tangible resources. It was sometimes difficult for ESS to evaluate the impact of such events on funders' evaluation skills. In future it would be good to explore ways to help people working for funders access (and pay for!) evaluation training if they need it – from ESS or others.
7. Another message we heard regularly was that people in funders find it hard to justify the time to focus on evaluation and learning. Ironically, the fact the trust and foundations don't have a funder to report to means there is no external driver making them prioritise evaluation over other important tasks! Having said that, funders are improving their evaluation and learning systems, so there is an element of funders being too hard on themselves.
8. The main challenges with the Funder Learning Programme – and the reason it has ended in its current format are twofold:
  - The Robertson Trust was probably the biggest beneficiary of the programme but the Trust has in effect been paying for other funders' learning. The Big Lottery Fund and the RS Macdonald Charitable Trust made important contributions (see Annex B) but the programme only happened thanks to the Robertson Trust grant. This is not a sustainable (or fair?) model going forward.

- The programme was not as joined up as it could have been with the Scotland Funders' Forum and Scottish Grantmakers. We kept in touch with these bodies and we don't think there was any confusion. However in future we think either or both of those networks should have a more central role co-ordinating funder learning. They could ask ESS (or others) to support funder learning as and when appropriate, rather than ESS taking the lead.

## Conclusion

The Funder Learning Programme has run its course in its current form but for the four years it ran it was successful in helping people in funders improve their practice and build connections. The programme's legacy is in the many resources funders themselves created and in the new relationships developed. Funders that have commissioned ESS to support funded organisations with evaluation ("evaluation support accounts") are meeting together to share learning about evaluations support and funder/funded relationships.

ESS is extremely grateful to The Robertson Trust, and particularly Christine Scullion, Cassy Rutherford, Linda Macdonald, and Karin Earl for their support and advice over the last four years.

[www.evaluationsupportscotland.org.uk](http://www.evaluationsupportscotland.org.uk)

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## Annex A – key background resources (click the images to see the publications on ESS website)



Valuable  
Relevant  
Proportionate  
Supported  
Look from inside  
& out

**Scotland Funders' Forum  
Evaluation Declaration  
Principles for good  
evaluation, learning and  
reporting with Scotland**



Harmonising  
Reporting:  
Making reporting  
more useful and  
less burdensome

Funders want to know:

- What did you do?
- What difference did you make?
- What did you learn

Contains practice on:

- Formats and language
- Relationships and support

**How funders in Scotland  
measure their own impact**

**Guidance from  
Scotland funder  
experience**

**Top tips** for building mutually  
beneficial relationships between  
funders and funded – [guides](#).

## Annex B

Other facts about the grant

- ESS received grant funding of £81,100 over four years. This mostly paid for ESS staff costs.
- In the first two years, some of this grant paid for direct work with the Trust and its grantholders. Those activities and outcomes are not included in this report – and were reported on separately to the Trust at the time.
- The Big Lottery Fund hosted two large events and paid for design and printing costs of *Walking the Talk*. The RS Macdonald Charitable Trust hosted the masterclasses.