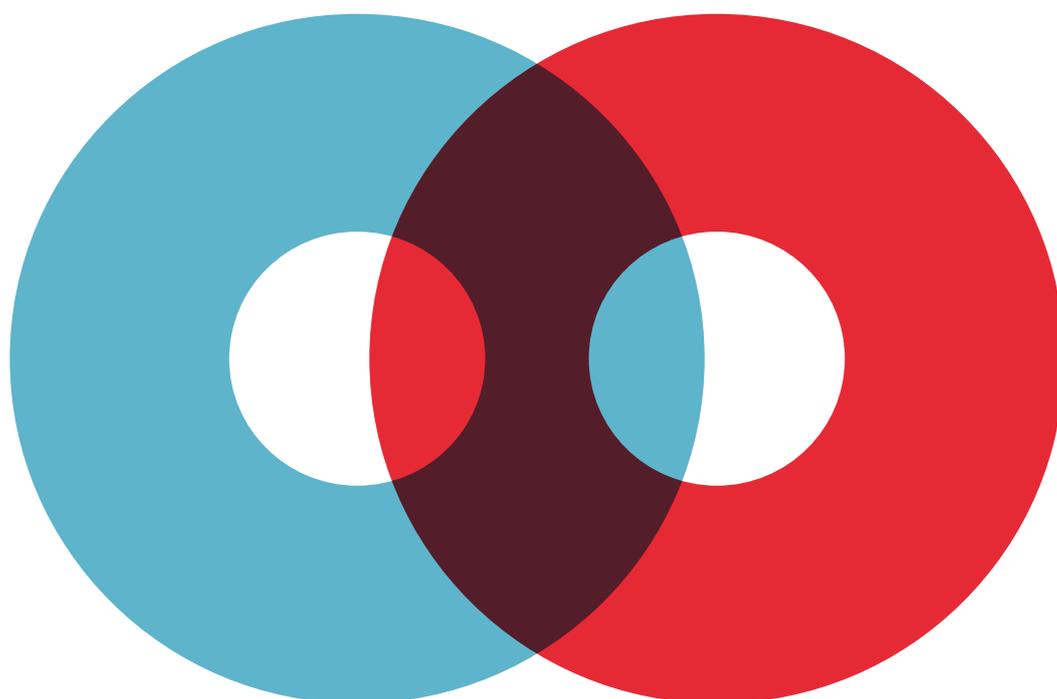


UK Evaluation Roundtable

2019 TEACHING CASES



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Authorship and Acknowledgements

These teaching cases have been written by Liz Firth.

Thanks to Corra Foundation and Pears Foundation for giving up their time and for sharing their experiences and ideas so freely and openly.

Notes for using the Roundtable teaching cases to support reflection and learning

Center for Evaluation Innovation, Tanya Beer

Institute for Voluntary Action Research, Ben Cairns

The two teaching cases offer a detailed snapshot of how two foundations think about, organise and practise learning. Exploring the cases in detail, using the questions and prompts set out below, provides a route into reflection about our own practice, as well as a prompt for areas of possible adaptation and improvement.

Part One

What routine behaviours characterise a high quality group learning practice?
How might we judge whether our learning practice is adding value to our work?

- 1) Begin by talking about your impressions from the two cases:
 - What are some of the dynamics or implications for what's possible with learning in these conditions?
 - 7 vs 40 staff
 - Large long-term grants vs small short-term grants
 - Solicited grantees vs open calls for proposals with rejections
 - Dedicated learning post at Corra
 - How do we think these two organisations think about the purpose of learning? What is it for?
- 2) This purpose orientation seems to depend a bit on how they think
 - about their role in social change/how they add value.
 - Corra uses the word "co-production" and notes that they are part of a movement with some sense of shared problem-solving goal.
 - Pears position themselves a little more behind the scenes, adding value by enabling others, so the focus of their learning is on how to enable. And how to support grantees in what they want to learn.
- 3) There's something here about *focusing* the learning in alignment with your purpose and how you see your role in change. What are some other ways foundations might define their role in social change and what

might that mean for how they focus their learning? E.g:

- Community network building role
- Policy influencer
- Field builder.

- 4) There are both explicit and implicit assumptions in these two cases about the set of behaviors that constitute a quality learning practice. What do we think each foundation believes it means to be “good learners”? More specifically:

Relationships and Interaction

- What are the characteristics of a relationship that make it a learning-oriented one as opposed to other kinds of good relationships?
- What’s the theory for each foundation about what it takes to build that particular kind of relationship? What kinds of conditions are necessary?
- And if you do have this kind of relationship established, how does the conversation look different? In other words, if you were observing a conversation that was really oriented around learning, what would it look and sound like?

- The nature of the commitment and time scale of the grants at Pears mean they are building relationships under very different conditions and constraints. Do you think it’s possible to build the same kind of relationship without those conditions? How might it change your expectations or strategies for building relationships that support learning?
- How does this idea get worked into the routine way of working?

Routine sense-making together to find patterns and draw conclusions

- People have all of these rich individual conversations. What does the work of making it learning at the team or organisational level look like? What are the choices the two organisations have made about learning that lives outside people’s heads? What’s the mechanism they use to do this?

Part Two

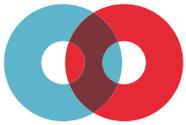
What kinds of inputs are critical for high quality learning? How should we focus and prioritise where systematic inputs will add the most value?

- 1) What do these two organisations believe about the inputs for learning—in other words, what kinds of information needs to be gathered and in what way to inform it? Let's start with some broad observations first about how their mindsets on this are similar?
 - Conversations
- 2) What are the advantages and risks associated with conversations as your primary input?
 - Cognitive biases - confirmation bias, what else? How do the two foundations work to guard against this?
 - People can only see the system from whatever perspective they happen to be standing in. What might the implications of that be?
 - Conversations are fleeting and live in the heads of the people who participated in the conversation.
- 3) If these two organisations were to prioritize *about what* they should collect systematic data for the purpose of learning, what do you think they should focus on?
 - CORRA has made a decision to collect outcome and performance data in a system. Why might this be an important input to their learning approach, given what we understand about their purpose and focus of learning?

Part Three

What incentives, both formal and informal, help or hinder learning and the use of data and evidence?

- 1) Again, let's start with a broad question. What kinds of features or dynamics *disincentivize* learning?
- 2) Now let's look specifically how CORRA is incentivising learning:
 - How do you think the idea of "having each other's back" manifests as a behaviour? How might it show up as a formal incentive?
 - What are the board and Chief Executive doing to incentivise learning?
 - What incentives might setting up performance indicators create with respect to learning?
- 3) Now let's think about PEARS specifically:
 - What incentives do we see at play in this story?
 - What do you think PEARS staff think it means to be good at their job?
 - How does this get set?
 - What about incentives for grantees?



UK Evaluation Roundtable

31 January 2019

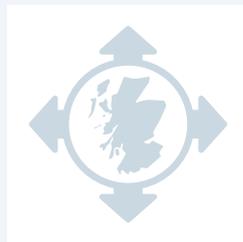
ivar.org.uk

evaluationinnovation.org

[@IVAR_UK](https://twitter.com/IVAR_UK)

Corra Foundation Teaching Case

A snapshot



Grants made across Scotland and internationally



One-year grants of up to £7,000 to grassroots groups working with disadvantaged communities



Strategic partnerships on:

Children and young people affected by drug and alcohol issues

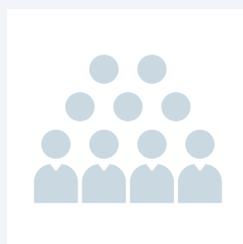
Place-based work in the most disadvantaged communities



Manages funds for the Scottish Government and others



Around £18 million distributed each year



40 staff and one dedicated learning post

1 **Mission and values**

2 This is the story of how Corra Foundation (the foundation) is working to
3 make learning everyday. It draws on conversations with two trustees,
4 three staff members and the foundation's own published material. Quotes
5 are unattributed, unless this is necessary for clarity. The story begins by
6 describing what the foundation wants to achieve, and the values that underpin
7 its approach to learning, before going on to explore how it is building its
8 learning culture and systems, some of the challenges it faces and the value
9 this learning delivers to its work.

10 Corra Foundation's mission is to make a difference to people and communities
11 across Scotland, by encouraging positive change, opportunities, fairness and
12 growth of aspirations, which improve quality of life. Its four strategic objectives
13 - being the best grant maker they can be; getting alongside communities;
14 sharing expertise; and working in partnership for greater positive impact -
15 all focus on how the foundation believes it should behave in pursuing this
16 mission, creating a coherent thread across a diverse funding portfolio.

17 The foundation is thoughtful and purposeful about its mission, not afraid to
18 tackle difficult questions: *'I think it's a foundation that will always do what's*
19 *right and not what's easy, and sometimes it's a lot easier to do the easy thing,*
20 *isn't it?'* It values and respects lived experience: *'It's about understanding*
21 *people where they are and helping them get to where they want to be, rather*
22 *than assuming that we know best where they ought to be.'* And it believes
23 fundamentally in the value of talking to people and building relationships:
24 *'What I have known the foundation for is its relationships. The relationships*
25 *built with the projects which we fund, the relationships which we foster*
26 *between those projects, the relationships with other organisations, the*
27 *relationships between staff and trustees, and trustees and trustees.'*

28 **Learning priorities**

29 Corra Foundation has always been committed to learning but lacked a point
30 of focus or much underpinning infrastructure. It was *'a bit like a tapestry.*
31 *We were doing things over here, but the actual picture was not coming*
32 *together at all. And if you'd have turned it over, there'd have been knots all*
33 *over the place.'* In early 2017, trustees agreed that it was time to create a
34 dedicated learning post, a role that would *'offer a confluence ... help us*
35 *to sight learning, understand how to discuss it and act on it.'* One of the
36 foundation's experienced grant managers was appointed as Head of Learning
37 Development. Her job was to help the foundation operationalise its mission,
38 objectives and values by making learning a dynamic and active part of
39 everyone's day-to-day work. And her work has crystallised three key priorities.

40 First is a strong focus on how to improve the foundation's effectiveness.
41 With strategic objectives that are all about behaviour and relationships,

1 *'we're learning so we'll be better - a better grant maker, a better partner for*
2 *others, a better partner to the communities that we're working alongside. And*
3 *[to be part of] a movement that is really alive or curious about how we could*
4 *all do better.'*

5 Corra Foundation is also beginning to tackle the challenge of how learning
6 can help it to make the strongest contribution to its mission. It is looking for
7 evidence and intelligence to support informed judgements about *'the big*
8 *existential questions'* around the foundation's overall strategic position. Big
9 questions for the foundation are variously identified as: *'How do we evidence*
10 *change and impact of what we fund?'; 'Where should we spend our money*
11 *in the future? Should we spend out?'; 'How are we adding value in how we*
12 *deliver work for others?'; 'Are our relationships enabling, facilitating or helping*
13 *change?'; 'How and how far does lived voice and experience really influence*
14 *how we work and function?'*

15 And it is giving high priority to learning about how to learn well - to creating
16 a culture where *'we all feel comfortable and safe to question and critique ...*
17 *within our own team and across the organisation. And that we are open to that*
18 *challenge and that critique from the relationships we form externally as well.'*

19 In all aspects of its learning, the foundation is looking for a mix of evidence,
20 drawn from grant management information, formal reports, publications,
21 academic research and a wide range of other sources. But informal
22 intelligence, based on day-to-day contact and simply talking to people, is
23 particularly valued: *'If I was to think of what we'd get really excited about in*
24 *terms of learning, it's much more likely to be "Here's what we're hearing from*
25 *grassroots, here's what we're hearing from people in communities, here's what*
26 *we're hearing from the frontline" than "Here's a really fantastic bit of data that*
27 *I've just found on Excel". I mean, I love a bit of data but thinking about where*
28 *the organisation as a whole would get its energy, we definitely value that*
29 *conversational side and where that learning's coming from.'*

30 As an organisation that wants to be open to others, both as a source and
31 generator of learning, Corra Foundation *'talks about relationships all the*
32 *time - all kinds of relationships.'* It is well aware of the particular challenges
33 of creating open and trusting relationships with organisations who need the
34 money it distributes. And it is notable in trying to build relationships of trust
35 not only with grantees but with applicants. The foundation worries about what
36 it means to stand alongside people and communities: *'Coproduction means*
37 *bottom up not top down. Coproduction might sometimes mean hearing things*
38 *that you didn't really think you might hear and weren't very sure whether you*
39 *wanted to hear ... it means a certain diminution of what might be the default*
40 *position for staff and for trustees, which is, "Ah but we might know better."*
41 *Maybe we don't. Maybe we don't.'*

42 This emphasis on relationships and conversations characterises the
43 foundation's learning style across the organisation: *'With the appointment*
44 *of Heads of Learning and of External Relations, we have strengthened our*

1 capacity to do more of the formal stuff around environment scanning. But
2 there's usually a personality in there - we have conversations, we know who will
3 know.' This strong organisational preference has shaped much of the recent
4 development work that has taken place around internal systems and practices.

5 **Developing learning practices**

6 Much of the foundation's learning sits in people's heads. One of the key
7 challenges for the Head of Learning Development has been how - and how
8 far - to capture and systematise this informal intelligence so that it becomes a
9 shared resource, supporting the delivery and development of the foundation's
10 strategy. Foundation staff are engaged and motivated: *'I think intrinsically
11 everybody takes a wee bit of time to think about what they've funded and
12 what they do, and they might say, "Oh, that was a really interesting thing."* But
13 they have lacked space and structures to reflect on these observations in a
14 systematic way - and then to share them.

15 **Building confidence and skills around learning**

16 The starting point for the Head of Learning Development has been to
17 work on individual confidence, skills and buy-in as cornerstones on which
18 to build an effective learning culture. *'The biggest thing for me is giving
19 people the confidence in their abilities to trust their observations, to trust their
20 judgements, to then be able to work as a team to think about how do we use
21 this information, how do we develop it?'*

22 She has been supported in this by a broader organisational culture that seeks
23 to build confidence and encourage sharing. This is seen in the detail of day-
24 to-day work, where needing help or advice is not seen as a weakness: *'I think
25 that's the way we feel here. That it's okay to say, I'm struggling a bit with this,
26 can you help me? ... And that just goes all the way through the organisation.'*
27 And in a general sense of everyone - from staff members through to trustees
28 - being on the same side: *'I think the organisation has got a cultural feel that
29 everyone's got each other's back.'*

30 Cultural attitudes play out in a number of positive ways in relation to learning.
31 Trustees are enthusiastic about it: *'I think what we're strongest on is that we
32 do want to learn. I think that is the strength of the Board as a whole ... There's
33 nobody sitting back and saying, "Oh, jolly good."* And they talk about their
34 confidence in staff and the intelligence they bring to the learning effort: *'Let's
35 suggest that a project says, "After all our endeavours, 55% of the children
36 are now off the Child Protection Register." I think our staff would say, "Mmm,
37 that's interesting. How's that done? And is that the best outcome for some
38 children?" ... so that's not just a figure, that needs to be dug under into what
39 that figure really means.'* There is a genuine willingness to do things differently
40 and learn from the process, strongly modelled by the Chief Executive, who
41 *'is always going to be supportive of an idea of doing something differently, of
42 bravery and boldness.'* She creates time and space for programme staff taking

1 leadership roles on new ideas and ways of working, helping them to *'think*
2 *through what might work, what we could test and looking at what comes out of*
3 *it.'* The trustees actively support this approach: *'They want to hear about things*
4 *that didn't work [and are] open to the idea that there will be lessons from things*
5 *we've tried. It's a very healthy signal to us as a staff team.'*

6 The foundation is working to reinforce this generally positive cultural
7 environment with specific skills development. Mostly the focus is on reflective
8 learning practices - on encouraging staff to ask themselves the question,
9 *'how do you really know that?'* - to consider the evidence that would tend to
10 support or challenge an impression or insight: *'I've had one conversation but*
11 *is that resonant of other conversations? Is that backed up by data that I've got*
12 *or is that backed by evidence I've seen from elsewhere?'* ... It's about having
13 the discipline to ask the question *'why'* rather than to just describe *'what'*.

14 The foundation has also taken opportunities to test new techniques in one
15 team and seeing how others can adapt and adopt them. For example, when
16 the foundation launched its new place-based programme in 2014, it needed
17 to create an underpinning learning framework. With external advice, they
18 developed the idea of producing weekly logs, to encourage staff to reflect on
19 their experience of the past week: *'We purposefully ask reflective questions*
20 *- such as "What difference do you think your delivery made last week?",*
21 *"What worked well and what worked less well?", "What could have been done*
22 *differently?"'* The logs are fed into a process of collective analysis. Facilitated
23 by the Head of Learning Development, every two months, team members
24 read each other's logs and ask questions of each other. Together the group
25 identifies common challenges in the communities where they work and what
26 the foundation can say or do about them: *'So we've learnt, for example, that*
27 *people will come along if they feel they are doing good or helping out - but*
28 *they may not think of themselves as volunteers. So we need to use a different*
29 *language.'* The findings are written up as a resource for the team day-to-day
30 and to feed into wider thinking in the foundation. Seeing the value in these
31 conversations and knowing that their logs are being read and being used in
32 the team and beyond has significantly increased the team's enthusiasm for
33 data: *'We now have people queuing up to do analysis, which I find interesting*
34 *- given that the first time we sat down to analyse the data all of them switched*
35 *off within about ten minutes! Now they're all really up for it ... and see how it*
36 *can really benefit them.'* It has also developed team members' confidence and
37 skills in identifying and sharing their learning. It was notable, for example, in a
38 cross-organisational meeting to prepare a response to a Scottish Government
39 consultation, that this team *'had practice in noticing, so they had more to say*
40 *and said it with more confidence. They had thought round the points they were*
41 *making and triangulated the evidence.'*

42 This 'culture-based' approach has not been without its challenges. There were
43 some initial expectations that appointing a Head of Learning Development
44 would mean there was *'someone to give learning to'*. And it has taken time
45 for some to see learning as embedded in day-to-day work rather than about
46 training programmes or time out for personal development. 'Learning'

1 remains a slippery concept: *'I mean I've spent hours over my career pondering*
2 *these questions but learning about what, for what? ... How do you know you're*
3 *doing your job? Am I doing this learning thing?'* But the foundation is content
4 not to pin down the idea of learning and what's in and what's out: *'Creating*
5 *the space and the time for people to enable them to do that kind of activity is*
6 *more important than what it's called.'*

7 As always, time remains a challenge: *'It's still that age-old problem isn't it? That*
8 *you've got a job to do and it would be nice to have more time to step back a*
9 *bit and do a bit more learning but there's normally some fires that are needing*
10 *to be fought.'* Creating and keeping space has to be a conscious priority for
11 managers: *'It's easy just to say, oh we're too busy today we'll just cancel it ...*
12 *But I think it's really important to say, no, we need to put time aside to take*
13 *stock and make sure everything's okay and is there anything we need to be*
14 *talking to each other about and developing?'*

15 **Sharing learning across the teams**

16 Building confidence and skills around learning in individuals and teams has
17 been the starting point for developing better sharing between teams: *'Every*
18 *organisation of any size always manages to group people into little groups*
19 *and teams, doesn't it? I'm trying to promote more cross-team conversations*
20 *and get beyond silos.'* The foundation's chosen mechanisms again reflect its
21 preference for relationships and conversations.

22 The all-staff meeting was identified as a prime target for improvement. Now
23 renamed *'the team blether'*, it always begins with 10 to 15 minutes where
24 staff just talk individually and in groups over a cup of coffee and a piece of
25 cake. Every meeting *'is chaired by a team, not an individual but the team take*
26 *responsibility for each of the meetings and they do something proactive with*
27 *the whole organisation.'* Routine updates are strictly limited: *'So it's not - I*
28 *went to this, I went to that, I went to that. It's more about what's important.'* This
29 approach is relatively new and not yet showing overt results around seeking
30 to learn from others: *'What I would like to see is people raising a question*
31 *to their colleagues ... So, maybe, "I'm really grappling with this, has anybody*
32 *got any ideas?"'* But relationships are being built and more cross connections
33 are being made: *'So, for example, our place team were saying "We're holding*
34 *some community events, we'd really like some folk to help out." And before,*
35 *we didn't see that kind of open sharing of support in that way; it would always*
36 *be a bit more formal and a bit more structured, usually through an email going*
37 *"We need people to do this." It was lovely to see. And I think it encourages a*
38 *different form of learning and insight.'*

39 A gap was also spotted at grant manager level. Corra Foundation runs a
40 number of distinctive programmes but, until last year, the grant managers had
41 no formal meeting. Grant manager meetings provide *'a safe place for us all to*
42 *talk about the problems we've maybe been having, the good things that have*
43 *happened and how we can then support each other.'* And they are designed
44 to help managers share specific skills across programmes: *'It's making sure*
45 *that no one is thinking, right, now I have to devise this new scoring system from*

1 *scratch, you know ... we're not that big an organisation. It's still really important*
2 *that we can then transfer skills and help other people out - and make sure that*
3 *we're using that knowledge.'*

4 Work is also going on to create and support conversations that enable
5 people to use their knowledge, skills and experience to feed into the bigger
6 strategic plan. For example, in responding to consultations with the Scottish
7 Government or others, *'rather than send that consultation out and ask people*
8 *to respond (because nobody ever responds) ... we get people together from*
9 *different teams and then say, right, "How can you feed in your views and your*
10 *thoughts?"'* Again this is a work in progress, with attention focused on how
11 to differentiate between the evidence the foundation has from its delivery as
12 opposed to people's personal views.

13 **Underpinning systems**

14 In the midst of all these conversations, a substantial project has been underway
15 to review and relaunch of the foundation's Salesforce database: *'It wasn't*
16 *producing the information that we needed. And that was our fault because*
17 *we weren't putting the right information in.'* The system was originally built to
18 mirror existing processes, which led to lots of duplication. The new version has
19 been rigorously scrutinised by the Head of Learning and another colleague,
20 who between them *'sat with everybody and went, right, let's understand*
21 *what your process is. How does it work? And then we questioned everybody*
22 *on every field. So, why have you got that field? What do you use it for? And*
23 *if you're saying, we just use it to tick a box or someone has to tick a box on a*
24 *form, we're like, why have we then got that in that system?'* The same level of
25 rigour has been applied to thinking about analysis and reporting: *'We worked*
26 *hard and long with our senior management team and with the teams on things*
27 *like coding. So the coding is practical, it's relevant and it potentially has a bit of*
28 *future-proofing as well.'* What has become clear is that aspiring to be a learning
29 organisation does not necessarily call for capturing more and more data:
30 *'We went from something like 500 fields down to 78 on our grant request bit.'*

31 Beyond sheer considerations of efficiency, the new database is how the
32 foundation hopes to begin to capture the learning that is in people's heads.
33 And to do so in a way that is relatively light-touch: *'It's about asking them to*
34 *reflect, so that they actually think about what's in their heads. And then getting*
35 *them to write it down and then creating the right kind of tool ... so other people*
36 *can query it. But without that being overly burdensome.'*

37 The new system will focus in the first instance on capturing informal
38 intelligence in two key areas - visits and conversations and routine reporting.
39 For the first time, staff will record their contact with grantees and applicants
40 in a structured format. They will be asked to record, *'What did you think was*
41 *the most important thing that emerged from that meeting? What did you think*
42 *the person felt most challenged about, if anything? Was there anything about*
43 *themes or actions going forward for you?'* And it was the 2018 Evaluation
44 Roundtable that sparked new thinking about how to record and assess
45 progress reports from grantees. Reflecting on the inadequacies of grading

1 reports as *'good, bad or whatever'*, the foundation has decided to focus
2 instead on understanding what makes a compelling progress report and -
3 in time - sharing that learning with the sector: *'We changed the question to*
4 *"Did you enjoy reading the report?" Yes, or no. And then we ask, "What made*
5 *it good? Was it the case studies, was it the feedback, was it the graphs?" ...*
6 *We've come up with a list.'* There are, of course, limitations in this approach: *'It*
7 *doesn't help us with the "what works well" question, or to analyse whether the*
8 *work has been good or not. But it is a start in thinking about how we analyse*
9 *reports collectively not just singly.'*

10 And it is making this kind of data more capable of collective analysis - *'finding*
11 *ways to generalise safely from individual comments'* - that is the primary aim
12 of the foundation's new system: *'At the moment, there is a risk of getting drawn*
13 *into a striking story or experience - a single shiny thing - and missing the less*
14 *obvious trends and patterns that are coming out across our funding.'* Informal
15 intelligence can then become a more powerful and robust part of its learning,
16 reporting and sharing with others. It reflects a conscious shift towards a
17 coherent cross-organisational framework and set of tools for analysis, rather
18 than looking at the work programme by programme: *'Organisationally it's*
19 *a huge benefit to us to think about the commonality between programmes*
20 *where there is commonality ... And we've actually been able to say, "Let's in the*
21 *future run a query across all of our grant-making and we'll understand what's*
22 *happening from all those different viewpoints."*

23 It is the challenge of this collective analysis - of drawing coherent themes
24 and ideas from a mass of data, without imposing a top down framework or
25 losing too much richness and diversity - that is exercising the foundation now:
26 *'That there's not a one size fits all probably makes it more of a challenge than it*
27 *might otherwise be, but to some extent that's also the success of it. One of the*
28 *reasons that we learn new things is because they're allowed to breathe and*
29 *can come through ... because of that lack of complete formality around some*
30 *of the anecdotal reporting, if you like.'*

31 The hope is that the new system will help the foundation to manage this
32 balance, giving more weight and consistency to qualitative data alongside
33 more easily generated quantitative results: *'My hopes are that we will have*
34 *everything in one place and that we will actually be able to get data that makes*
35 *sense and is not just about numbers.'* But there are notes of caution: *'I think*
36 *there's probably still some people thinking that this is going to be a magic tool,*
37 *that when you put the data in it gives you every answer that you need and there*
38 *won't be any analysis needed.'*

39 **Using learning**

40 All this work to improve the framework for learning in Corra Foundation is
41 driven by a commitment to use it - and use it well: *'It's about seeing, it's about*
42 *articulating what you see and then it's about acting on it ... Otherwise it's just*

1 *tokenistic twaddle.* The foundation is using learning to drive change in its own
2 day-to-day practice, through sharing learning with others and in informing
3 its overall strategy and direction. All are seen as works in progress, at different
4 stages of development.

5 **Improving Corra Foundation's grant-making practice**

6 In their different ways, all the foundation's programmes are trying to deliver
7 value to every applicant that meets their criteria, whether or not they are
8 successful in achieving a grant. And its commitment to being the best
9 grant maker it can be has seen many changes - both big and small - in the
10 way it delivers its programmes. For example, feedback is now given to
11 unsuccessful applicants and grantees alike. And it is not just about explaining
12 the funding decision but offers comments on what stood out and how the
13 organisation might improve future applications to any funder.

14 Directly informed by grantees and applicants, these changes come from an
15 organisational instinct to drive through the detail of what it means to deliver
16 the foundation's strategic objectives and values in practice. Corra Foundation
17 sees a value in spending time thinking, for example, whether the kind of
18 language it uses properly expresses the kind of organisation it is and wants to
19 be. Or if it needs to ask all the questions it does of applicants - and to examine
20 this at a fine-grained level: *'If you believe you should learn then you have to
21 put your heart and soul into developing processes which will help you learn.
22 And if you haven't got the processes in place, then you go and find them from
23 others and you learn from, and are willing to learn from, others.'*

24 Senior staff are clear that implementing this learning calls for *'moments when
25 we decide to gather everything up and test it ... so maybe we'll pilot three
26 things over the next wee while and see if they work. You can sit with learning
27 a long time and if you don't have any moments, you might miss momentum.'*

28 They also hope that attention to building and actively using learning to make
29 changes in day-to-day practice will support staff motivation and people's
30 sense of having and doing a good, and a valued, job: *'You know yourself the
31 frustrations that people have in organisations are usually about the fact that
32 they think something should be different and they're never asked if it should
33 be different, and even if they say it no-one will listen to them. And this isn't an
34 organisation where people feel like that.'*

35 **Sharing learning externally**

36 *'Learning isn't about "keeping things locked up in a cupboard," ... Being a
37 good learning organisation is sharing that learning and not being precious
38 about it.'* Corra Foundation is conscious that many of its recent efforts around
39 learning - with the focus on culture building and new systems - feel a bit
40 introspective. But the relationships held by staff are both a critical source of
41 data for the foundation and the primary means by which it shares learning
42 with applicants, grantees, partners and others: *'No database or analytical tool
43 will ever beat what they can do!'*

1 Sharing with voluntary and community organisations largely takes place
2 through grant management relationships, funding advice sessions, programme
3 delivery relationships and periodic group discussions, around either the
4 foundation's practice or emerging areas of need. Some of Corra Foundation's
5 programmes involve people with lived experience in reviewing what a good
6 application looks like and sharing that perspective with applicants. For
7 example, in its strategic programme on drug and alcohol issues, *'young people
8 look at the ideas that come forward and present lots of questions. And they're
9 very important questions - these are all young people who have experience
10 of drug and alcohol issues in their home life and they might say, for example,
11 "Social workers [are] always at the door" or "Sessions in school are a load of
12 rubbish". So, we expect people to be reflecting on what young people are telling
13 us about their experiences and addressing those points.'*

14 Relationships also play an important part in sharing learning with other
15 funders: *'We're quite active in the grant-making community so I feel like
16 they're quite a big focus; there are fairly strong relationships between grant
17 makers across Scotland.'* Much of this exchange happens informally but the
18 foundation is ready to take a lead where this feels appropriate. It has recently
19 convened both a group of funders and a group of operational charities
20 working on emotional wellbeing and mental health for children and young
21 people: *'So we've got these kinds of conversations going and we're going to try
22 and get people back together again to go, right, is it just a case of that we all
23 understand where each other are and that we're making better signposting or
24 connections. Or is it that we need to do something much wider?'*

25 Trustees have taken a formal decision that Corra Foundation should
26 aspire to having influence over policy and practice: *'We've got a policy
27 implementing plan that's absolutely connected to our learning and the
28 learning that's coming from those that we're working with and alongside.'*
29 Relationships continue to play an important role, but this area of work
30 shows an increasing focus on more formal methods of sharing learning. For
31 example, the foundation supported a participative learning programme to
32 enable children and young people with parents in recovery from drug and
33 alcohol issues to tell their stories and get their voices heard by practitioners
34 and policy makers: *'The report [Everyone has a Story] got picked up by
35 Scottish Government who funded a couple of other pieces of work based on
36 that and are really keen to see how they can embed the voice and experience
37 in that piece of work in the refresh of their strategy for drugs and alcohol.'*
38 Findings will also be published from a current review of the impact of the
39 foundation's drug and alcohol programme.

40 The foundation has been offering additional training to staff interested in
41 becoming social media champions in their teams and taking an active role
42 in sharing ideas and learning through blogs and other forms of messaging.
43 There is no formal approval process: *'We trust everyone to go out and make
44 relationships and go to conferences - so why not trust them to do this too?'* It
45 has also organised Parliamentary events, well attended by people from the
46 communities where it works, young people and others with lived experience

1 of the subject under discussion, *'literally putting the voice in the room, which*
2 *is how you make sure people pay attention and listen.'* Delivering programmes
3 on behalf of the Scottish Government creates direct links to policy advisers,
4 as well as creating opportunities to share learning about effective practice.
5 One of the desired outcomes of work to capture and systematise qualitative
6 learning from grant-making relationships is to make this a more robust source
7 of evidence for sharing with partners: *'We are very much wanting to embrace*
8 *the idea of "From the ground up, how can we have a deeper body of evidence*
9 *that either supports what the academic and other research is saying or maybe*
10 *puts in new ideas and opportunities, or tests new ways of working?"'*

11 **Using learning to drive strategy**

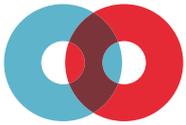
12 Trustees are sharply aware of the importance of organisational alignment
13 behind the agreed strategy: *'I think certainly the previous time that the three-*
14 *year strategy was implemented, or perhaps the first time, ... it was two to three*
15 *months late in being signed off because there wasn't quite alignment through*
16 *the Board and with the senior team. And ... it's better to get that alignment*
17 *than have the fudge.'* And both trustees and staff see learning within the
18 foundation as the key driver for understanding the impact of the strategy and
19 developing for the future.

20 This means Corra Foundation puts considerable emphasis on how the Board
21 learns and uses its learning. Trustees talk about a Board that is receptive to
22 learning and values a range of inputs. There is a sense of respect across the
23 different disciplines represented on the Board and of the skills and knowledge
24 of the senior team. And this respect extends to staff, other organisations and
25 beneficiaries: *'I don't think any foundation can say it's a learning foundation if*
26 *it does not take account of the people with whom they are working alongside,*
27 *who they are working for, if they're not listened to. And that of course also*
28 *includes the staff. It's about listening to the staff.'*

29 Over the recent past, the Board has deliberately *'helicoptered out in terms*
30 *of the detail of the day-to-day - we are really clear that we are not the senior*
31 *management team.'* This was signalled by a governance review, which
32 included a major overhaul of board papers. As the Board and the team settle
33 into a new way of working, the focus is increasingly shifting from operational
34 detail to strategic questions and challenges. Despite formal reporting on
35 grants, this change has made some members feel out of touch with the
36 funded work. So the Board has introduced a programme of presentations
37 from team members: *'A sort of deep dive into their area, and that was really*
38 *warmly received ... It isn't part of a formal reporting process, it's more about*
39 *how do trustees learn properly about what is the business of the foundation*
40 *without themselves having to run it.'* The response from staff is equally
41 positive: *'It was just great watching the trustees listening to her presentation*
42 *and then asking her lots of questions and her opinion on things ... It was*
43 *fantastic to see that happening ... And I think it's making sure the staff know,*
44 *it's okay, the trustees aren't quizzing you; they're genuinely trying to increase*
45 *their knowledge and make sure they're up to speed on where things are.'*

1 Corra Foundation is still some way from the overarching framework that
2 it believes will be necessary to enable judgements to be made about
3 performance against its strategy. And the Board is very engaged in work
4 with senior staff to improve the flow of learning and evidence from practice
5 to strategy. A sub-committee of the Board and senior management team
6 have been working on a top-level, cross-organisational set of KPIs, designed
7 to give the Board proper sight on performance against strategy and what
8 is happening in the broader environment: *'It's not about saying "Did we do
9 what we said we would do?" but more about tracking what is coming out
10 of our funding - what this is telling us about what we, or others, can do to
11 make more of a difference?'* And a working group involving three trustees is
12 looking at how the foundation can develop a formal outcomes framework,
13 which benefits from both quantitative and qualitative data: *'I think we've got
14 good processes for collection. But we do need to work on what we need in
15 terms of data to show us that we are achieving our strategic objectives. We've
16 recognised that and we're working on it.'*

17 But Corra Foundation equally recognises that good learning informs
18 judgements - it does not make them. The Board is currently engaged in an
19 extended programme of open discussions about future direction: *'This is a
20 deliberate year-long piece of work because I think you have to learn through
21 experience in order to make those decisions.'* Intelligence to support these
22 discussions comes from the senior team; trustee's own skills, networks
23 and knowledge of the political environment; trustee involvement in *'the
24 granular detail'* through the subcommittee structure; other external input;
25 and *'obviously there's all the formal reporting that we get ... the board papers
26 completely inform the decisions that we make every two months. But in terms
27 of where we go next, it's beyond the papers I think that we have to look.'*



UK Evaluation Roundtable

31 January 2019

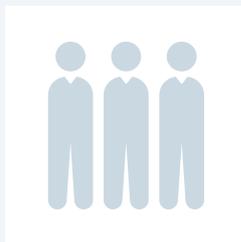
ivar.org.uk

evaluationinnovation.org

[@IVAR_UK](https://twitter.com/IVAR_UK)

Pears Foundation Teaching Case

A snapshot



An independent, British family foundation, rooted in Jewish values



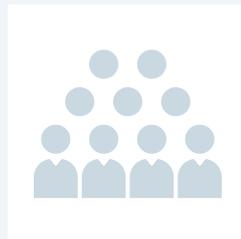
£15-20 million of private money invested in good causes each year



No applications: grants developed through research, outreach, recommendation and conversation



Diverse and varied programme with global reach



Executive Chair, Director and seven other staff

1 Mission and values

2 This is the story of how the Pears Foundation (Pears) understands learning and
3 how this plays out in its ways of working. It draws on conversations with three
4 staff members, public statements from trustees and Pears' own published
5 material. Quotes are unattributed, unless this is necessary for clarity. The
6 story begins by describing the aspirations and values that underpin Pears'
7 approach to philanthropy, before going on to look at how learning works day-
8 to-day in Pears, the impact it has on practice and relationships and some of
9 the questions it is exploring.

10 The three Pears brothers established the Foundation in 2003 to apply some
11 of the resources of their family's property company *'to fund organisations and*
12 *projects working to deliver progress on key issues affecting the wellbeing of*
13 *people in the UK and all over the world.'* All are trustees and closely engaged
14 with the work, especially through the role of the full-time Executive Chair.
15 Pears is fundamentally an expression of their values and their aspiration to use
16 philanthropy as a transformative force in society.

17 Pears' vision and underlying mission are broadly framed, setting out a
18 commitment to be part of a global effort to break down barriers to progress,
19 inspire young people and others in active citizenship and create spaces
20 for passionate people to develop their ideas and apply their talents - all
21 with the aim of *'making people's lives better, wherever and however we*
22 *can.'* Grants support the causes that trustees care about and organisations
23 engaged in these causes, who welcome an engaged funder seeking a very
24 close relationship with its funded partners: *'Relationships are at the heart of*
25 *everything that we do. We're not just about the money; we play a very active*
26 *role in supporting our partners while they develop, and we stay with them for*
27 *the long term.'* The work is underpinned by values of passion, professionalism
28 and integrity - and Pears seeks these values in all its partner relationships.

29 The role of learning

30 The Pears approach is all about identifying good people, doing good work,
31 learning with them and helping them to do better. It sees commitment as an
32 essential starting point in how it gathers and uses learning: *'For us, "commitment"*
33 *comes first ... a commitment to going on a journey with a project or charity.*
34 *Once you do that, the learning comes. My learning, and our team's learning, is*
35 *refined on a daily and weekly basis in terms of how we operate, who we work*
36 *with and what we do - it's a continual, evolving process.'*¹ And this commitment
37 is underpinned by unrestricted core funding, available for the long term.

38 So learning is what the Pears team do - above almost anything else: *'Unless*
39 *you are continually learning, what's your function as a grant manager*

1 Executive Chair, <https://pearsfoundation.org.uk>

1 *in a foundation that gives long-term core funding and does not accept*
2 *unsolicited applications?’ And the central purpose of its learning is to support*
3 *organisations to do what they do well: ‘Whatever it is you’re doing, however it*
4 *is you’re doing it, wherever it is, whoever with, how can we help you do it the*
5 *best that you possibly can in the circumstances you’re operating in?’ Broadly,*
6 *this focus drives four key learning priorities:*

- 7 • creating meaningful and trusting relationships with grantees
- 8 • understanding ‘real life’ organisational development
- 9 • being well-informed
- 10 • sharing learning effectively as a team.

11 Although Pears encourages and supports funded partners in formal
12 evaluation of their work and impact and is interested in their findings, this is
13 not critical data to support its own learning. Pears has worked with learning
14 partners and steering groups in relation to particular grant programmes
15 and funding streams, but its focus is always on ‘*onward direction*’ rather than
16 individual or collective impact. The model is one of day-to-day reflection and
17 challenge rather than ‘*working, working, working then gathering everything*
18 *together and reporting.*’ External help might be sought to tease out specific
19 questions arising for partners around a programme of work ‘*but there*
20 *wouldn’t be a point where we would say, “Right we’ve done five years of this*
21 *grant programme, it’s time for a big evaluation”.*’ The work Pears supports is
22 often collaborative, aspirational and complex where it is hard to articulate
23 what or how much difference an individual contribution has made. But, more
24 importantly, its commitment is based on shared values, and is not just a means
25 to achieve a particular end: ‘*There is absolutely no point in a grantee giving*
26 *us huge amounts of detail about how poverty relief is going in Birmingham*
27 *– because that is their job, not ours. There is nothing we will do with that*
28 *information, we don’t need it. And if we suddenly need it, we know where*
29 *you are – we’ll ask for it!*’ Conversations and reporting are much more about
30 anticipated challenges, thoughts about the year ahead and takeaways from
31 the past year. ‘*They are almost always about “what’s next” because that’s the*
32 *information we need to take decisions about how we can best help.*’

33 And Pears is clear that, in some cases, causes simply must be pursued no
34 matter how intractable they seem, ‘*because not to continue to chip away is*
35 *unthinkable. It does make a difference when people see you bang your head*
36 *against the wall. You’ve identified it and you’re still present at that wall, as*
37 *opposed to sticking your head in the sand and pretending the wall doesn’t*
38 *exist. It’s maintaining attention on the issue.*’

39 **Learning priorities and practices**

40 **Creating meaningful and trusting learning relationships**

41 First and foremost, when Pears engages with a cause it is looking for
42 organisations – and organisational leaders – who demonstrate its values of

1 passion, professionalism and integrity, and want the Foundation to become
2 a partner in their efforts. Rooting learning in these relationships means that
3 developing its skills in making and managing relationships is a key priority.

4 For Pears, starting with commitment is fundamental. When engaging in a
5 new topic or area, it seeks out not one but a cluster of organisations, who
6 may be taking very different approaches. It then commits money and time to
7 these relationships, getting to know these organisations, understanding their
8 fit with the Pears approach and what it can do to help them drive change:
9 *'There'd be other organisations that would want to research, scope, plan, then*
10 *commit, and that would be like the end stage. But for us it's first in our cycle*
11 *of "commit, learn, refine".'* Understanding and capturing this idea was a key
12 moment in crystallising and communicating Pears' approach: *'I remember the*
13 *conversation where that language emerged, and it was this epiphany moment*
14 *because it's backwards, it's not the way people usually talk.'*

15 Trustees and staff are united in their commitment to building open and
16 long-term relationships with funded partners. So grant managers never feel
17 exposed in developing relationships of trust: *'You set up expectations. You go*
18 *there, you sit in the café with them, you look them in the eye. And we as grant*
19 *managers can go into those relationships with the knowledge that our Board*
20 *will back us to manage that relationship responsibly.'* Pears is scrupulously
21 careful never to penalise partners for honesty: *'If you turn around and say,*
22 *"We massively messed up on this", we say, "Okay, well, what did you learn from*
23 *it? How can you make sure that doesn't happen again?" Why on earth would*
24 *anyone be honest with us if we're going to walk because of it?'*

25 Not all grant relationships work out for the longer term. Generally they
26 founder when there is a mismatch of expectations and a grantee cannot
27 make a deep learning relationship with a funder work: *'Part of our job as*
28 *grant managers is to constantly be saying to our grantees: "Please do not*
29 *walk into that meeting with a shining annual report and 'De dah!' By all means*
30 *celebrate successes with us. But we're going on a journey together and you've*
31 *got to share some of the things that you don't know the answers to, that you're*
32 *struggling with, and we'll share the same."* For some, the Pears approach
33 proves simply to be not right: *'We work best with organisations that are*
34 *continually reflective - and with people whose instinct is to communicate, share*
35 *and explore these reflections.'* But commitment means commitment and Pears
36 will have an honest conversation and leave the relationship over a period of
37 time: *'We don't leave an organisation stranded.'*

38 Relationships are underpinned by clear expectations. From the start, Pears
39 was concerned not to be perceived as excessively bureaucratic but has learnt
40 the value of 'rules of engagement' in supporting good learning relationships:
41 *'When I started, we had a very generic grant letter, and we now have a five-*
42 *page grant agreement. So, however informal our relationships are, they are*
43 *underpinned by a legally binding contract that places obligations on both*
44 *sides, and we need both.'*

1 And relationship building takes time. With a small team, Pears has this
2 time because of its decision to seek out grantees rather than respond to
3 unsolicited applications. And *'those relationships have to be as good as they*
4 *possibly can be. So, we put a lot of thought into how we prepare for meetings,*
5 *how we exit meetings, how we follow up meetings, and using the diary.*
6 *Everything is relationship managed.'* It also has the advantage of being able
7 to act on what it learns – to respond to new opportunities and ideas, without
8 undue impact elsewhere: *'We don't have fixed budgets. Resource is not*
9 *officially capped. That doesn't mean it's limitless, but it is expandable within*
10 *opportunities that trustees want to take.'*

11 Pears is also very conscious of the importance of adding value, not sucking
12 it out: *'In a ten-year grant there will be a couple of times when you're on the*
13 *"weekly therapy cycle". And that's absolutely part of what we're there for. You*
14 *shouldn't enter into relational grant-making if you don't have the skills and*
15 *trustee backing to do that when it's necessary. But you also have to have the*
16 *judgement and confidence most of the time to back right off. You can't go in*
17 *and say, "We're in this relational grant-making thing where we do unrestricted*
18 *long-term support and it's really freeing" and then take up all their time!' At any*
19 *given time, around 50% of grantees, within each grant manager's portfolio*
20 *of around 30 to 40, are in a straightforward cycle of grant renewal, based on*
21 *an annual structured conversation where they share insights into the sector*
22 *and the challenges they are facing: 'So, most of what we have to do is say,*
23 *"Thank you, keep going, let us know if anything else happens and here's some*
24 *unrestricted funding."' The intention is to be clear that Pears is always there if*
25 *needed 'but that they don't have to give us too much thought otherwise.'*

26 Pears has experimented with formal grantee feedback but found the results
27 from its diverse portfolio too generic to be helpful in its learning. It relies
28 on grantees to have the courage to tell them when the relationship is not
29 working or how they could improve: *'We're always aware that we have to make*
30 *the decisions ultimately and not get too close, but there is an unusual amount*
31 *of feedback, partly because they trust that it won't be penalised.'* Managing
32 the power dynamic is a question that the team come back to regularly,
33 sometimes after sharp reminders that funding is something that even the
34 most confident of grantees rarely takes for granted. For example, a recent
35 experience has reinforced the importance of beginning a renewal discussion
36 with confirmation that the grant is safe: *'I thought we were having a lovely chat,*
37 *and at the end of the meeting I said, "And of course we'll renew the grant", and*
38 *he visibly sagged and went, "Oh, thank God." And I was like, "How awful that*
39 *you've spent the last hour genuinely not knowing. We wouldn't do that to you,*
40 *we wouldn't bring you into a meeting and out of the blue say, by the way, we're*
41 *cutting your grant.'"*

42 **Understanding organisational development**

43 Working with selected partners, within a long-term funding framework and
44 a committed relationship, gives Pears great freedom. When engaging with
45 grantees, they are never faced with the challenge of finding a reason to say

1 'no'. Instead of focusing on assessment, they can give all their attention to
2 the question of how best to support organisational development: *'All our
3 monitoring and reporting has the huge luxury of being constructive. We are
4 never looking to pick holes in something in order to reject it ... So the power to
5 be constructive sits with the grantee.'*

6 Pears knows its grantees well and conversations are deep and often
7 challenging. Its overview and level of engagement in the sectors where it
8 is active means it picks up and is 'sense checking' data from many sources:
9 *'Collaboration is a really good example. If an organisation says that they're
10 incredibly collaborative but on Twitter they are busy extolling everything that
11 they do and nothing that their partners do, I would be aware of that. I wouldn't
12 hold it against them, but there is a mismatch there between their stated values
13 and their practice. And I would use it as the basis of a question.'*

14 Day-to-day conversations with grantees are all about their own work and
15 context. But, through this, Pears is trying to tease out learning that will help it
16 to be effective in its support role, both with this grantee and for others. They
17 want to understand *'what is making your life hard at the moment. Because that
18 is what we take back and say either, "I think our grantees would really benefit
19 from some professional development on this", or "Actually we need to think
20 about increasing the grant for two years because that's the problem", or "We're
21 going to have to think about helping them recruit some different trustees", or
22 whatever it is.'* Some of this support is delivered directly by the Foundation
23 through its operating programme, JHub, which runs a programme of high-
24 quality organisational and professional development training.

25 Pears visits organisations in their own space, partly so as not to impose on
26 their time but also to keep their learning grounded in the realities of delivery
27 on the ground: *'You can say to a Trustee Board "Community engagement is
28 really hard for primary schools." But you need to be in a primary school with
29 them and to see that the class has 35 eight-year-olds with one newly qualified
30 teacher. Visiting and talking is about experiencing complexity in a way that
31 doesn't make you think you've got the answers. It basically makes you think
32 there are no answers, and therefore gives you a really clear appreciation of
33 anyone that is even close to an answer - and a healthy suspicion of anyone
34 claiming to have found "the solution".'*

35 Time and experience build individual team members' understanding and
36 skills in supporting organisations: *'I've basically been privileged to see so
37 many organisations go through so many different phases of development, that
38 I have a kind of deck of cards in my head that help me to help that organisation
39 better. Because I can now ask a better quality of question.'* And it is reflection
40 within the team that plays a critical role in turning individual impressions and
41 knowledge into shared expertise around organisational development and
42 barriers to change: *'A bit like one of those artificial intelligence machines -
43 the more learning we can absorb about how organisations grow, develop,
44 evolve, the more we can help.'* Reflecting on the way one partner has tackled a
45 problem opens up ideas for how another might tackle a similar or connected

1 one. Equally, experience of developing a model or approach in one sector
2 might read across to another: *'That's our job at its heart. Connection spotting,*
3 *pattern spotting, warning sign spotting - and then talking with our partners and*
4 *using our resources, networks and expertise to help them.'*

5 **Being well informed**

6 The Pears team are *'avid consumers and collectors of information'*, from
7 grantees, through access to their learning, from the wider sector, from other
8 funders and beyond. *'We're not the expert in the areas we fund, but we need*
9 *to know enough. I think of it like the civil service model, we need to know*
10 *enough to make recommendations and to make good decisions, but let's not*
11 *kid ourselves that we're the experts.'*

12 A lot of time is spent out of the office visiting grantees, going to conferences
13 and seminars, connecting with other funders and so on. The team consciously
14 create space to keep *'tuned into particular channels and people'*, including
15 media, journals, press articles and social media, and *'understanding who the*
16 *voices are in the sector that are quite prescient.'* Some of Pears' funding is to
17 organisations dedicated to analysing and surfacing issues from the wider
18 sector. And it makes grants to organisations to fill gaps in research, sitting with
19 partners to hear the findings from some of the most experienced academics
20 in their field: *'Half an hour with them and you're pretty much up to speed and,*
21 *you know, that is a massive privilege.'*

22 This day-to-day intelligence gathering means Pears is *'quite sensitive about*
23 *understanding what might be coming round the corner'* and the effect this
24 might have on the challenges facing grantees. But it does sometimes feel the
25 need to convene when, for example, *'the government throw something into a*
26 *sector which is quite sensitive to funding changes or whatever, and you can see*
27 *this sudden tremor thing happening.'* Conscious of the pressure on grantees,
28 this is kept to a minimum.

29 **Sharing learning effectively as a team**

30 With such a strong focus on learning through engaged, individual
31 relationships, Pears is very aware of the need to share and learn together:
32 *'We have this incredibly rich data, and it's in our heads.'* In its early years, the
33 Foundation was *'tiny, so we were all learning together, and how it happened*
34 *didn't need to be made explicit.'* But, with a growing team, the Director
35 identified the need to create more formal structures to enable Pears to
36 reflect together, *'pulling out the knowledge that already exists with the*
37 *team and sharing it, and learning from it, and thinking about how we draw*
38 *conclusions from it.'*

39 The structures she adopted reflect the close engagement with trustees.
40 With an Executive Chair, reflection with trustees is a much more immediate
41 and day-to-day process than in many foundations: *'It's a real combination of*
42 *a philanthropic family, who hired a professional team and wants to empower*
43 *them to work closely with them ... It isn't the professionals going off and doing*

1 *their own thing and reporting into the Board once a quarter. And it isn't the*
2 *Board dictating, and then you get disempowered professionals.'* The Director is
3 not a conduit between staff and trustees but *'the conductor of the orchestra'*,
4 attending to the flow of Pears' activities and keeping things in balance.

5 And the Pears approach to sharing learning supports a strong organisational
6 preference for an iterative style: *'I know the way we learn is we're going to kick*
7 *the tyres on this for a bit. Some people develop a theory and will let it trickle*
8 *down, and I don't think that's how we do it. It tends to be experiential. We try*
9 *something and then we tend to go back and say, "Okay that was better but not*
10 *quite right. Let's reflect a little bit more, and now let's add this in to the mix",*
11 *and eventually we get to something.'*

12 Although working individually with grantees, team members talk a lot - and
13 find this valuable. Team members are *'actually very different. So we do bounce*
14 *things off each other and I know that if we discuss something, I'll get insight.'*
15 But maintaining the flow of informal contact and conversation is challenging
16 when the team is dispersed or out of the office for significant parts of the
17 week: *'It is hard to keep that relationship when you need to be on the ground*
18 *somewhere else.'*

19 So communication is supported by a clear structure for the week, which
20 always begins with a Monday morning meeting to go through the diary. Friday
21 is a day in the office for the whole team, with no external meetings. The day
22 starts with a meeting between the Executive Chair, Director, Director of JHub
23 and others as needed *'to go through any urgent decisions and reflect on*
24 *bigger picture, strategic issues.'* The rest of the day is *'open plan office day'*
25 where the team make active use of the intended benefits of being in the same
26 space, without the interruptions of external meetings: *'It's a day where there*
27 *is much more acceptance of interrupting and talking or of peeling off to have a*
28 *coffee and a conversation.'*

29 And the team has invested in formal techniques to support reflective learning,
30 introducing four frameworks at the annual team awayday over recent years.
31 This experience has strongly influenced its funder plus programme for
32 grantees, which now incorporates training in these techniques.

33 Polarity management was the first, offering an approach to tackling
34 unsolvable tensions which helps organisations think them through and
35 achieve a positive balance. This has become a day-to-day framework for
36 reflective thinking in Pears: *'It forces you to name what you fear and what you*
37 *value, and it has proved a very good way of us having those conversations.'* For
38 example, in Pears there is a pull between *'generosity and strategy'*. In simple
39 terms, the team favours a strategic approach - collecting evidence from the
40 sector, listening, learning and *'deploying resources where we feel they will*
41 *make most difference.'* While interested in strategy, trustees also want the
42 opportunity to be generous - to simply support an organisation or cause
43 because it is good and worthwhile. Both of these impulses are positive, but
44 they cannot be completely reconciled. Polarity management has given Pears a

1 way of understanding this tension and managing it, rather than swinging from
2 one extreme to another. And one practical result is a programme of small
3 grants given as a surprise Christmas gift to organisations working on a theme
4 outside Pears' usual priorities - in 2018, this was access to nature.

5 Myers & Briggs was next, enabling the team to examine the differing
6 psychological preferences in how people perceive the world around them
7 and make decisions. This has proved valuable for both internal and external
8 relationships, helping the team to think about how they communicate
9 with people who are different to them: *'I'm someone who responds well to
10 structure and spreadsheets and plans, and my trustees trust that I am, so when
11 I'm talking to them, that's not the framework I should be using. [I need] to use a
12 much more ideas-based language that resonates with them. And that has really
13 changed overnight the quality of the conversation we could have.'*

14 Six Thinking Hats provides a more structured form of brainstorming,
15 which requires everyone to view a question or challenges from different
16 perspectives: *'There are some people on a team who will naturally be the voice
17 of doom and others the voice of enthusiasm, and it allows people to explore
18 the other role.'* Belbin is the most recent addition to the Pears toolbox, with
19 its focus on team dynamics and roles. It has been used to manage risk in
20 preparation for the Director's maternity leave, helping the team to understand
21 and plan for the roles that others would need to take on in her absence.

22 In part, Pears uses these techniques to provide a level of objectivity to the
23 team's reflection and learning. It has struggled to use external evaluation - or
24 even structured feedback - in a way that feels meaningful or robust. *'If we had
25 a lot of information that we were collecting but not processing, outside help
26 would be really valuable. But we already have the ingredients that an external
27 evaluation would look for - in the knowledge that the team collects and
28 processes day-to-day. So what we need are the tools that enable us to unpack
29 and learn from it, as a team.'* Investing in techniques and frameworks provides
30 the team with 'a theoretical lens' on Pears, its effectiveness and progress. And
31 *'they give us a language and a moving off point for conversations that we all
32 know are vital to the way we work.'*

33 Critically, *'it enables a diverse group of personalities to work on a relational
34 basis, and I mean that both internally and externally.'* It helps individuals to
35 understand why some of their grant relationships are more difficult for them
36 to manage than others and to learn from colleagues with different preferences
37 and approaches. And it helps the team to *'keep the learning at the heart of it
38 and not crowd it with internal thoughts about "I'm not going to listen to their
39 bit of learning because they just are narrow-minded about anything that's too
40 visionary." It enables us to say, "I'm finding that hard to hear because you're
41 framing it in a particular language, but can I just check, in my terms it would
42 sound like this ... ?"'*

43 The annual two-day awayday is the point where the team step back and
44 use these tools and others to reflect on the big questions for Pears and its

1 practice. Drawing on the ideas of Ronald Heifetz around *'getting off the dance*
2 *floor and going onto the balcony*², this is the moment in the year when the
3 team concentrates on the task of making connections and spotting patterns
4 by looking at all its different styles, portfolios and grants together.

5 The focus at the team's 2018 awayday on grantees and relationships
6 illustrates the approach. Although Pears looks for a set of core values across
7 all its grantees, it is clear that there are many types of 'Pears person' - and
8 *'sometimes they're totally different and you have to be able to shape-shift*
9 *into a different type of person, because sometimes the very thing you need*
10 *within your particular challenge or portfolio or sector is an arrogant bugger*
11 *who's going to go and shake things up.'* And there is no attempt to make the
12 team, which is united by shared values and culture but not by style, behave
13 in the same way in their relationships: *'We manage grants very differently,*
14 *but we understand that. The level of engagement and quality is the same, but*
15 *we allow our staff to be themselves and to be their full selves.'* At the 2018
16 awayday, the team did an exercise to tease out the broad types of grantees
17 that they are working with - and especially those that different grant
18 managers find challenging. Together they looked at each 'type' through the
19 prism of their strengths, the downsides that those qualities can bring and
20 how to manage them well.

21 This has delivered immediate and tangible benefit: *'Now, when I'm dealing with*
22 *her [a charity CEO], I almost have that list in my mind. I remember the strengths,*
23 *remember that this woman brings extraordinary strengths, and we need her*
24 *because of that.'* And Pears believes that it enables the team to respond
25 effectively to a whole spectrum of different types of people, based on their
26 shared passion for a cause, not their personal preferences: *'So it's not trying*
27 *to impose a type on our grantees, it's actually the opposite, it's by accepting*
28 *that our subject areas are broad, that we work with these massive spectrums, so*
29 *how do we impose patterns on it that allow us to manage effectively.'*

30 **Some challenges and questions**

31 **Underpinning systems**

32 Pears maintains robust grant management records about organisations,
33 commitments, reporting, renewal and payment dates and so on, but *'the*
34 *real issues that underpin it are in my head or in my notebooks, which go back*
35 *ten years!'* Historical memory is crucial in Pears and well supported both
36 by having a very stable team and the role of the Executive Chair. But it has
37 recently acknowledged the need to address the risk inherent in relying on
38 this approach: *'We have just instituted a formal system and we'll see how it*
39 *goes. We're calling it a due diligence record, but basically, it's relationship*
40 *records. So, a document that allows us to record key issues, things that are*

² Heifetz, R. and Linsky, M. *Leadership on the Line: Staying Alive Through the Dangers of Leading*.
Boston: Harvard Business School Press, 2002

1 coming up in our meetings, and key things you need to know to manage this
2 grant, about the organisation or the relationship.'

3 The team is teasing out what such a record needs to include to add value
4 without trying to mirror the complexity of real-life relationships between
5 individuals. The question is: *'What is essential to pass on, that a colleague can
6 learn from and needs to know, and what just adds colour to it in my head but
7 doesn't need to be managed that way.'* The emerging answer is that the focus
8 is on identifying and managing risk - which for Pears clearly includes the risk
9 of missing opportunities and potential - so that this knowledge is recorded
10 and available as an organisational resource, not just shared informally.

11 **Reporting**

12 There is ongoing discussion in Pears about whether or not the Foundation
13 needs a more formal approach to reporting. Grantees do produce written
14 reports to an agreed timetable, but the nature of the reporting depends on
15 the grantee and its relationship with Pears and varies from grant manager to
16 grant manager. This is almost always something that the grantee produces for
17 another purpose: *'Where there is an organisation, either it's small or its reports
18 are quite corporate, we will accept those in whatever form. But that will dictate
19 the type of conversation we have. Some of our very longstanding partners
20 will write very clear Pears-sensitive reports which capture things, and then the
21 meeting can be very short. But it varies a lot depending on who that person is
22 and how I know they operate.'* The last team discussion on the development
23 of a reporting template concluded that this would not add value and reporting
24 arrangements should continue to reflect the individuality of Pears relationships.

25 **Sharing learning with other funders**

26 Pears is actively involved in funding partnerships and a range of initiatives
27 around improving grant-making practice. It is always ready to share ideas
28 and learn with other funders. But it is organisationally reticent about drawing
29 broad conclusions from its work to share with others.

30 Part of this reflects a sense that some elements of how Pears works, and
31 especially the day-to-day engagement of the Executive Chair and the
32 way it finds grantees, are genuinely unusual. This may limit the value of its
33 experience to foundations which work in very different ways. And partly it
34 reflects a concern that the diversity of its portfolio and relationships drives a
35 rich learning picture but not one that can be aggregated or analysed - and
36 certainly not in a way that would have any practical application.

37 Pears appreciates good quantitative evidence when it relates to partners'
38 work: *'There is a real pleasure in seeing it and helping them understand it, and
39 what it points to - and what it leaves unanswered.'* But it collects little or no
40 data about their work or impact. Pears' interest is in the ideas and conclusions
41 that have been sparked by partners' learning, the opportunities and barriers
42 they see, their plans and priorities - and in being a partner in that conversation
43 so that it can make informed decisions about how best to help them.

1 **Limits to growth**

2 Learning in Pears relies on internal relationships of respect and trust - and on
3 direct interaction between trustees and all staff managing grant relationships
4 on behalf of the Foundation. Trustees have ambitions to increase their
5 contribution and do more but without losing the ability to *'know the people*
6 *they are funding and to look them in the eye.'* This feels like the core challenge
7 for Pears going forward: *'The biggest issue we have are these ambitions to*
8 *grow and how do we achieve them without just taking on ten more people that*
9 *will report to [the Executive Chair] and the structure will fall apart?'*

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