

Philanthropic Trusts investing in building evaluation capacity with NGOs: Collaborating to make a difference







Roundtable Reporting/Evaluating Pilot 2014/15 For SKYCITY Auckland Community Trust Grant Recipients



- ✓ Supporting families to thrive and prosper
- ✓ Supporting not-for-profit organisations to thrive and prosper

Overview of the presentation



- Context for Roundtable Reporting/Outcomes Focused Evaluation
- Aims of Roundtable Reporting for both SKYCITY Auckland Community Trust and Recipients, Motivation for Participation
- Format for Roundtable Reporting
- Learning to Action for both the Trust and the Participants
- Collective Social Impact and Reflections



What is Roundtable Reporting?





- Roundtable reporting is verbal reporting in a group setting.
- Typically a small group of grant recipients discuss their progress (success and challenges) towards agreed outcomes with the funder.
- During the discussion opportunities to achieve greater social impact moving forward are discussed.



The context for Roundtable Reporting?



- The pilot built on previous work undertaken by the Trust on outcomes-focused accountability and improving capacity of recipient organisations to report on outcomes through funding the 'Dancing with Data' evaluation capacity building programme of workshops held in 2013/14.
- New form of accountability for grant recipients that has been trialled by philanthropic trusts in Australia (Portland House Foundation) and New Zealand (Todd Foundation).



Aims of the Roundtable Reporting Pilot for The Trust



- To enable the Trust to better understand the difference being made (outcomes and impacts) through current grant making.
- To enable the Trust and recipients to adopt a more collaborative approach to sector problem solving.
- To enable the Trust to consider how future grant making could be targeted to increase social impact.





Aims of the Roundtable Reporting Pilot for the Recipients




- To enable recipients to share their story with the Trust in person.
- To build transparency, trust and partnership.
- To provide opportunity to discuss challenges and celebrate achievements.
- To support learning across the sector (e.g. strengthening evaluation and planning practices)

Participation



- All recipients were invited to participate. 70% (47) opted in, of them 33% had previously taken part in a Roundtable evaluation.
- Motivation for opting in included seeing it as a learning opportunity - encouraged by the positive experience of 'Dancing with Data' evaluation programme and/or excited by the opportunity to talk through evaluation practices.

Participation



- 61% wanted to strengthen their evaluation practice
- 55% thought participation would help their organisation to understand the Trust's priorities and decision making process
- 45% felt that written reports did not fully represent their work and achievements and believed that a verbal presentation offered better opportunities to convey successes.

Format of the Roundtable Reporting



- Two 2hr sessions Nov 2014 (mid grant) and Feb 2015
- An introduction from the Trust about grant making principles and priorities
- A 5-6 minute presentation by recipient organisations
- Individual feedback/discussion on presentation
- A group discussion about evaluation practice, emerging themes and common issues at the end of the session

Learning to Action – Opportunities for the Participants




"It good to see SKYCITY have a focus on evaluation tools and helping us to improve."

Learning to Action – Opportunities for the Participants



- **89% of the participants identified that the evaluation feedback received during the session was the most useful aspect of their participation in roundtable reporting.**

"The feedback was great – particularly after years of presenting written accountabilities with no feedback provided."

"I have thought a lot about the direct evaluation feedback that was given to me and I have taken it back to my management team."

Learning to Action – Opportunities for the Participants



➤ 94% of the participants identified areas they would like to improve on in relation to how they conduct outcomes-focused evaluation.

"We will re-write our evaluation plan and focus this on outcomes/impact of our programme resources. We will gather stories and testimonials as we go about our work and use these to support our funding applications."

"I will take away the importance of evaluation –it needs to be a priority, not just on the back burner."



Learning to Action – Opportunities for the Participants



➤ 89% of the participants agreed as a result of participating they feel better equipped to report to funders about their outcomes.

"I feel very isolated in Northland – this has widened my perspective and has given me ammunition to plan for future funding and engaging my staff in planning to shift our focus to outcomes."

"I learned about Results Based Accountability – she simplified it and now, bang I get it! This will be so useful to us."



Learning to Action – Opportunities for the Participants



"I feel disturbed! I really enjoyed it. It has been a good challenge and I will take this disturbance forward and think about a separate evaluation plan for 2015-16, so its not just implicit within other strategic plans".



Learning to Action – Opportunities for the Participants




"It has been a privilege to gain insight into other successful organisations. We need to lift our game and will take that on board".



Learning to Action – Opportunities for the Trust






Learning to Action – Opportunities for the Trust



- On balance roundtable reporting proved a more dynamic method of reporting with better outcomes than the written format.
- It provided opportunities for the Trust to feed evaluative learning into decision making.
- It offered rich learning and evaluation capacity building opportunities for recipients.



Evaluating Collective Social Impact

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meaningful outcomes for social services
improving resilience, independence, support systems

Evaluating Collaboration for Social Impact

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Towards Collective Impact

John Kania & Mark Kramer (2011) identified five key elements:

- Common Agenda** - "Negotial parties moving towards the same goal"
- Common Progress Measures** - "Measures that get to the TRIE outcome"
- Mutually Reinforcing Activities** - "Each organization is brought as part of the overall effort"
- Communications** - "This allows a culture of collaboration"
- Backbone Organization** - "Takes on the role of managing collaboration"

"... we believe that there is no other way society will achieve large-scale progress against the urgent and complex problems of our time, unless a collective impact approach becomes the accepted way of doing business."

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How Evaluating Collective Impact Relates to Roundtable Reporting

- Use evaluation to enable strategic learning
- Employ multiple evaluation designs for multiple users
- Shared measurement (contested)
- Seek out intended and unintended outcomes
- Seek out contribution, not attribution to community changes

<http://www.collaborationforimpact.com/five-simple-rules-for-evaluating-collective-impact/>

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Roundtable Reporting Pilot 2014/15 Evaluating Across Organisational Boundaries

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