collective
wellbeing
Carnegie
UK

Preserve, Grow, Compost.

Reflections on the process of creating Carnegie UK's new impact learning framework

Contents

Learning is a process of reflection and adaptation. To help you adapt your ways of working, it is helpful to understand what is delivering well and needs preserving, what work has promise and needs to be supported to grow and where there are practices or projects that no longer serve your needs and need be composted.

– Lucent Consultancy

1. Introduction

"The role and nature of policymaking affects how it can be measured. Policymaking does not happen in isolation, it involves multiple stakeholders, is non-linear, and takes considerable time and responsiveness to changing contexts."

– Lucent Consultancy

At Carnegie UK, we seek out and promote wellbeing approaches that change people's lives for the better.

We are an organisation motivated by change, and in 2021, in preparation for the launch of our new strategy, we committed to improving our practice in making change happen. The first step on this journey was to learn more about our impact. We wanted to think more purposefully and strategically about how we know whether our work makes a difference.

Our practice includes influencing policy in the UK and Ireland. But recognising that policy change is complex and nonlinear, we worked with Lucent Consultancy to learn more about ways to influence policy and measure change. The work included a literature review, interviews with stakeholders, and workshops with members of the Carnegie UK team.

Lucent challenged us to think differently about how to evaluate our work. They encouraged us to reflect on the parts of our approach that were successfully helping us to understand our contribution (preserve); the things we hoped to do more of (grow); and the ways of working which were not helping us to learn, or to understand how we were contributing to change (compost). This paper brings together some of our learning along the way[1].

Though the detail shared here is specific to Carnegie UK as a wellbeing organisation working across the UK and Ireland, we believe some of the insights gathered could be useful to anyone, whether you are interested in social change; are similarly trying to influence policy; or are curious about evaluation tools and methods. However, we acknowledge that some of the learning shared here requires time and resources not afforded to every organisation.

In the final section, we explain what we are hoping to do differently as a result of this process. We are invested in the collective impact of alliances and - as we plan to continuously reflect on our practice - we would welcome a conversation with anyone similarly grappling with these challenges within their own organisation.

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1   Lucent Consultancy, 2022. Preserve, grow, compost: a tool for renewal when things feel stuck. Available at: https://www.lucentconsultancy.co.uk/strategy-toolbox/preserve-grow-compost-tool.

2. How social change organisations are approaching impact and learning

During the development of this project, we quickly realised that the context of how change happens is evolving, partially because of significant changes to ways of working in response to the COVID-19 pandemic.

In this section, we outline some of these emerging themes, as well as the tactics of those we spoke to and learned from are using to make change happen.

Lucent's rapid literature review and interviews with stakeholders[2] considered four key questions relevant to the work of Carnegie UK. We asked:

· **Why do foundations measure impact?**

· **How does an organisation assess the impact of policy-influencing activities?**

· **How do foundations consider their own contribution alongside others?**

· **What approaches are other foundations with similar goals to Carnegie UK taking?**

Interviewees were asked to reflect on their own approach to impact and learning. In this section, we draw out some of the key themes that emerged, along with some of the tactical ways of working they detailed around impact and learning in their organisations.

Many foundations have considerable freedom to use an approach that best enables their learning

While for many operational charities impact measurement is driven by external demands for accountability, for the foundations we spoke to, the main purpose of impact measurement is to inform learning, which is then built on to improve practice.

Unlike some charitable organisations who are reliant on funding and are therefore 'compelled to collect impact data to validate themselves and persuade funders to keep giving them money,'[3] foundations have considerable freedom to adopt an impact approach that best enables their own learning.

Yet, feedback collected during the interviews highlighted a common desire for a more consistent approach in this area. Several people spoke of an interest in developing a systemic approach within their organisations, but acknowledged that this could be seen as being in tension with the fact that 'learning' is also inherently about people and needs to make room for the social, the informal and the human.

A common tactic was developing collective or collaborative learning approaches and rethinking the funder's role in this space:

"A key question is about who should be doing the learning. Is it for us or for others? The foundation sees its role as being to facilitate, not gatekeep."

It is becoming increasingly common practice for foundations to commission learning partners[4], to try to look across programmes and projects for impact and learning, and outside organisational cultures and ways of working. Learning partners take on 'mentor, mirror, and midwife roles' which can support this reflective space[5]. Building on this approach, foundations are starting to see their role as undertaking a form of aggregated and collaborative learning, where they provide the space for others to learn.

Understanding this collective impact continues to be discussed as an area that could facilitate social change. However, there are limited examples of actual deployment of this method at scale. One interviewee commented on their organisation's trial:

"Early signs are that it is very promising, though it requires a lot of relationship building and trust so it can be time intensive. We can see the requirements for shared data and a common platform that partners can use, so we're not waiting, we're commissioning this work now."

3   New Philanthropy Capital, 2015. Why charities should collect less impact data. Available at: https://www.thinknpc.org/blog/why-charities-should-collect-less-impact-data/.

4   Lucent Consultancy, 2022. How learning can help you make more impact. Available at: https://www.lucentconsultancy.co.uk/insights/becoming-a-learning-organisation.

5   Dartington Service Design Lab, 2022. The mirror, the mentor and the midwife: What makes a good Learning Partner? Available at: https://www.dartington.org.uk/ourblog/makingagoodlearningpartner.

A distance between government and civil society

Our research suggested that the UK Government's approach to policy making has changed over the last decade and is now less amenable to listening to civil society[6] . This may be attributed to a more defensive ideology amongst those in the UK Government and an overwhelmed civil service.

One interviewee suggested that everyone involved was becoming less practised at working with those who disagreed with their own perspectives. For our organisation this means our routes to influence at a UK level need to change and adapt in a way that allow us to make change happen, while still being led by our evidence-base and organisational values.

At Carnegie UK, we remain curious about the extent to which there is a similar change in approach in the devolved jurisdictions, with relationships between civil society and the Welsh and Scottish Governments appearing to be more open and discursive.

Around half the people interviewed reflected on **the increasing importance being placed on influencing public opinion,** which might in turn bridge the gap between government and civil society. For some, this was because public opinion was one of the few effective ways of influencing government decisions, and for others it was an inherent part of systems change:

"Real change comes from engaging mainstream society, not by sector bodies talking to each other."

One interviewee reflected that it often felt like there was a widening gap between how civil society organisations viewed issues and the attitudes and perceptions of the public.

Reduced time and resources for policy making and evidence

Foundations have a role to play in creating the space and time for people to be thoughtful and curious. This is especially important in the context of organisations they fund coming under increasing pressure to survive, to be efficient, and justify their existence. As one participant said:

"The current trend is for organisations downsizing and/or looking to reduce overheads. Impact, learning, research etc. are often counted as overheads and so we are losing capacity in the sector."

6   Sheila McKechnie Foundation, 2022. Shrinking civil space is every charity's business. Available at: https://smk.org.uk/shrinking-civic-space-is-every-charitys-business/?mc_cid=b217dbf2e2&mc_eid=c055b94852.

Real change comes from engaging mainstream society, not by sector bodies talking to each other.

Emphasis on evidence

Less clear is the role of 'evidence' in establishing 'what works.' Arguably, it has its origins in funders or government having confidence that money has been well spent, but it is also about sharing learning and driving up quality across civil society. The creation of 'What Works Centres' and tools like 'Standards of Evidence', can be seen as part of this thinking. Such developments may have unintended consequences though, as one interviewee explained:

"The Standards of Evidence came to be seen as a hierarchy which needed to be climbed and the emphasis became how organisations could improve their evidence rather than improve their work. This led to a somewhat dysfunctional market where thousands of small scale evaluations seek to justify investment. A grossly inefficient use of resources which spreads skills and experience too thinly for anything meaningful to be produced."

The interviews suggested that there seems to be a move to try and 'make sense' or 'describe the whole' when it comes to impact, as opposed to looking at individual aspects of an organisation's work. The **'Theory of Change' approach is useful here as a way of building and organising a narrative**. A common critique is that a Theory of Change is reductionist or too linear, but people are often reassured when they understand the purpose is about 'sense making', rather than to be literal or prescriptive. It is interesting that the concept and utility of the theory of change approach has endured whilst so many of the other elements in this space have shifted.

Quantifying beneficiaries

Discussions highlighted that finding a meaningful way to quantify the beneficiaries of societal and/or policy change is not always possible, nor particularly useful, as it can underplay unintended consequences and overplay impact. For foundations, far from the delivery of services, attempts to do so are unlikely to be a good use of time and could also be prohibitively expensive. Similarly, placing an emphasis on the number of people reached could inadvertently give the impression that this is of most importance and therefore drive colleagues', partners' and grantees' behaviour. This perspective was articulated by one stakeholder as being about a need to shift mindsets when working on systemic issues:

"The impacts are about mindset shifts, changes in policy and improved systems and conditions and in that sense, the potential 'beneficiaries' are the entire population so we do not attempt to measure the number of people who benefit."

Systems thinking: contribution not attribution

Assessing the impact of policy-influencing may lend itself more to qualitative and systems-thinking approaches. The message from the interviews undertaken was to conceptually locate work within a systems-thinking approach and then be realistic about how much the 'mapping' of such systems can ever reflect the real world.

The approach of looking for contribution not attribution is now common practice, perhaps in recognition of the complexity of systems and the fact that policymaking involves multiple stakeholders and is non-linear. Perspectives on describing and quantifying contribution differ, with most preferring to take a narrative approach.

Tactically, interviewees detailed the need to think and act as a network. Recognising the complexity of systems, the non-linear nature of policymaking and the need for different (and sometimes conflicting) perspectives requires consistent collaboration, as detailed by most interviewees:

"Think as a network not as a single organisation. In this sense, a vision needs to be seen as a rallying call for collaborators."

"We overemphasise the extent to which the impact of an organisation is determined by its size. In philanthropy there has been a tendency to focus on the number of dollars managed, but that isn't impact. After all, compared to government, it's all tiny. Impact comes from thought leadership. Thought leaders push other thought leaders and that changes systems – that's real power, real change. "

"As foundations we have convening power, if we can think and work in networks, then we could have an impact many times greater than that which our own budgets would suggest."

Relinquishing power

The issue of power is complex. When foundations seek to have influence, they are utilising their pre-existing power which is often derived from money, or from being considered part of the established voice of civil society. In

assessing the impact of their own policy-influencing, foundations should consider their legitimacy and impact on others' voices:

"I wonder whether we should have influence. If we do, we run the risk of crowding out civil society, taking their voice rather than enabling them to take the platform. We are in places they can't get to."

Another important issue is the need to better involve those furthest away from power. This has led some foundations to use co-production and co-design approaches.

Power cannot be ignored when it comes to understanding impact; not only in terms of involving communities, but also in terms of conceptualising what impact means; how value is determined; how change is assessed; who should benefit from learning; and whether practises in all of the above enable or inhibit people's voice.

Organisations ahead in this thinking are openly using language such as "anti-racist or anti-discriminatory approaches". They recognise that the choices they make influence where power is placed in our society.

"All models of impact are highly contextually specific. There is a sort of replication crisis going on. You have well evaluated stuff that then can't be replicated because contexts are different. It's a live issue for us. Power has a large part to play and it's why we're moving to more co-design and co-production with people with lived experience."

The impacts are about mindset shifts, changes in policy and improved systems and conditions and in that sense, the potential 'beneficiaries' are the entire population so we do not attempt to measure the number of people who benefit.

Indicators that build to domains

Those who had adopted many of the tactics discussed in this paper have gone on to develop a model of impact which saw their organisation commit to a simple purpose/vision statement and then identify a handful of high-level domains which they believed were critical components of achieving their purpose.

Their intent was not to attribute linear or narrow causality in their model, but rather to treat it as a way of understanding and making sense of the systems in which they work. They identified a number of indicators for each domain, which again were not causal or exhaustive but were intended to provide an awareness of trends within society. The data for these indicators was available from public sources which meant that foundations did not need to invest in data collection or analysis.

Spotlight: Robert Wood Johnson Foundation

Robert Wood Johnson Foundation's use of existing data sets to measure indicators which track back to 4 domains is an elegant and holistic example.

Their new vision, Building a Culture of Health, is about taking a more holistic approach to health in America and recognising that health care and health care systems only play a very small role in creating health. The Foundation focuses on four action areas in its framework: Making Health a Shared Value; Fostering Cross-Sector Collaboration; Creating Healthier, More Equitable Communities; and, Strengthening Integration of Health Services and Systems.

There is a recognition in the Foundation that this is a generational vision and that no one organisation can achieve it alone: *"It's deliberately set out as something others can rally to."*

The four action areas above are measured via 35 benchmarks or proxy indicators, which are tracked at national level. For most part, these indicators are measured from existing data sources, and they are broad in nature. For example, voting participation is measured as an indicator which tracks back to civic engagement, which in turn is part of making health a shared value.

3. Preserve, Grow, Compost. What does this mean for Carnegie UK?

Based on the themes identified during the interviews, Lucent Consultancy made the following recommendations for a new approach, based on their research and work with us to understand what we hoped to preserve, grow and compost. This involved keeping and building on some elements of our past practice, as well as a shift in emphasis away from some of our traditional metrics and approaches. While this approach is specific to the work of Carnegie UK, we believe that there is learning for others.

Our work with Lucent involved several all-staff workshops where we discussed the findings of their literature review and interviews, and considered how we could use their recommendations to inform our Impact Learning Framework. We are grateful to Lucent for ensuring that these conversations involved our whole staff team, encouraging us to see impact as something for all to consider, rather than the responsibility of certain individuals.

Key recommendations

- Seek to mix qualitative and quantitative evidence.

- Value both informal and formal evidence of impact.

- Connect learning with action.

- Tailor the approach for different programmes and keep it proportionate.

- Recognise complexity in change making.

- Recognise the value of relationships, networks and reflection alongside outputs.

4. Our Impact Learning Framework

At Carnegie UK, we have always changed with the times, learning from the evidence and evolving our approaches as we go.

Our purpose is better wellbeing for people in the UK and Ireland. Our experience tells us that we can have the biggest impact on people's lives when we influence decision-makers, whether these are businesses, politicians, civil or public services, or non-governmental organisations. We want to go on learning about collective wellbeing and the things you can do to improve it, continuously asking ourselves:

- **What are we learning about wellbeing?**

- **What are we learning about how change comes about?**

As a financially independent organisation, we are privileged in that we are not required to 'prove' to funders or others that our work has an impact. Instead, we want to learn about whether our practice and work is effective, and how we can 'improve' what we do.

By making a shift from monitoring impact to 'proving' change, to using information and learning gathered to 'improve' our work, we seek to learn about how our programmes and broader advocacy helps to achieve the strategic aims set out in our 2021 Strategy.

Our Impact Learning Framework outlines how we will gather and share our learning about how change happens as a result of our work. We will use this knowledge to improve our practice.

There are three components of the Framework: our principles, approach, and tools. Whilst the tools are specific to Carnegie UK, we detail below the principles and approach developed as a result of the work.

Learning and governance

The Framework was developed by the Carnegie UK team through a process of engagement with the Board of Trustees, who considered in parallel how learning plays a role in broader governance of strategy. We are continuing to make space for learning at the Board table.

Embarking on the new Strategy, the Carnegie UK Board of Trustees explored governance of learning, through a process of developing and defining their own appetite and curiosity for learning.

Following a series of interviews and workshops, they co-produced a Learning Statement, which set out Carnegie UK Trustees' commitments around culture, questions, and practices. In the reflective blog that IVAR authored[7] following this work, they outlined three important components of the approach to putting learning at the centre of a foundations practice and decision making:

1. **An articulation of the meaning of learning**

2. **Embracing the concept of 'strategic learning'**

3. **Recognition that how you do it matters.**

7   Institute for Voluntary Action Research (IVAR), 2021. Giving learning a seat at the strategy table. Available at: https://www.carnegieuktrust.org.uk/blog-posts/giving-learning-a-seat-at-the-strategy-table/.

The Principles

The Impact Learning Framework is underpinned by five principles. At Carnegie UK, we will use these principles to develop Programme Impact Plans and to provide consistency across Programmes. They aim to enable flexibility while guiding our overall practice. The principles also reflect our organisational values of being motivated by change, challenging, collaborative and kind.

Proportionate - We do not create undue pressure or bureaucracy. The emphasis is on learning and sharing about how change happens, not simply reporting. Our tools will be embedded in our organisational practice, built in, not bolt on.

Flexible - The process of learning about our impact and the change which is occurring can be made suitable for a wide range of Programmes, with the ability for Programme teams to create bespoke plans which best reflect the outcomes they seek.

Aligned - All of our work is seeking to put wellbeing at the heart of decision-making, make progress in tackling issues that threaten wellbeing and build our understanding of wellbeing. Conversations around learning about change will feed into our wider organisational work.

Open - We are open to sharing learning internally and more widely, including about what has not worked. We will be comfortable with recognising where our work may have unintended consequences.

Evidence-based - Learning from what we do and how this contributes to change will be underpinned by evidence, either qualitative or quantitative, based on programme requirements.

The approach

Our approach is outcome focused. It is based on producing clear, realistic, singular and specific outcomes, monitored flexibility through tailored programme impact plans. When it comes to evidence, we have chosen not to place an emphasis on the type of evidence required, but instead have provided a set of supportive, reflective questions to help frame discussions. While some programmes will have quantitative evidence, not all will. As an impact learning framework, the evidence is likely to include a lot of qualitative information.

We want learning to be a part of our day-to-day discussions in programmes and across teams. To do this effectively, we mark out specific times in programme meetings to talk about what we think we are seeing. We need to take time to curate our learning into insights that will give us the impetus to act more effectively when required.

5. Our commitment going forward

We recognise that the hard work starts through taking action - bringing our new framework to life in our everyday ways of working, and continuously reviewing and refining our approach to reach the outcomes we've identified.

To deepen our learning culture, we commit to being more open to external input and challenge, through stakeholder feedback; independent evaluations; working with learning partners; and seeking and establishing more collaborative working relationships.

In practice, this looks like making sure we set aside enough time in programme meetings, all team workshops, and one-to-one conversations to reflect on the change we are seeking to create, and how we might refine our approach to get there.

It looks like starting new partnership projects with conversations about our values and the outcomes we hope to achieve together. And it looks like reporting to our Board on programme milestones, significant moments, and our learning along the way.

We would welcome a conversation about this with anyone similarly grappling with these challenge or curious to hear more about our approach - please do get in touch.

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