

Committee:	Date:
The City Bridge Trust	30 th October 2013
Subject: Strategic Initiative: UK Evaluation Roundtable	Public
Report of: Chief Grants Officer	For Decision
<u>Summary</u>	
<p>This paper proposes that you commission the Institute for Voluntary Action Research to prepare a study of evaluation practice by charitable grant-makers, and to convene a meeting for leading trusts and foundations where they will discuss a case-study specially prepared for the day. The benefits to City Bridge Trust, as well as the other participating grant-makers, will be an improved understanding of the design and use of evaluation.</p>	
Recommendation	
<p>That the Institute for Voluntary Action Research is commissioned to convene the inaugural UK Evaluation Roundtable for charitable trusts and foundations, at a cost of £5,000, to be charged against the City Bridge Trust Strategic Initiatives allocation for 2013/14.</p>	

Main Report

1.0 Background

- 1.1 The Institute for Voluntary Action Research (IVAR) is a registered charity that specialises in researching voluntary and community sector organisation and management. Whilst IVAR applies academic rigour to its research, its focus is on finding practical solutions to voluntary sector problems. IVAR's publications, as well as its research processes, are intended to support charities, funders and policy makers with their day-to-day work.
- 1.2 Based on an idea already implemented successfully in the US, IVAR plans to convene the first ever UK Evaluation Roundtable for charitable trusts and foundations. This will be a learning opportunity for grant-makers with a shared interest in measuring the impact of their funding. Grant-makers will discuss their practice with IVAR in advance of the roundtable, from which a benchmarking survey of current evaluation practice, a think-piece on new directions in evaluation, and a teaching case will all be produced. These outputs will be discussed at a meeting in March 2014.

- 1.3 IVAR will work on the UK Evaluation Roundtable with the US-based Centre for Evaluation Innovation which has been conducting similar exercises for North American grant-makers since 1990. The US experience has shown the value of case studies as a means of sharing knowledge and experience amongst foundations in a structured way. The approach uses examples to show participants how similar organisations have addressed some practical challenges in their own work, and to encourage people to reflect on how they might use the new ideas these case studies generate to improve the quality of their own monitoring and evaluation.
- 1.4 Although UK grant-makers currently have a number of network meetings convened through infrastructure organisations such as the Association of Charitable Foundations and London Funders, these tend to be peer led and lack the capacity to generate independent research of the participants' own practice. The larger grant-making organisations, like City Bridge Trust, often have their own dedicated monitoring and evaluation teams, and there is a strong interest in sharing knowledge with their peers.

2.0 UK Evaluation Roundtable

- 2.1 IVAR has already engaged 15 UK grant-makers who have committed to contribute their expertise to the studies in advance of the roundtable, and their time at the roundtable itself. These grant-makers will take part in a benchmarking study of current evaluation practice within UK foundations, and this will be made available at the March 2014 meeting.
- 2.2 The Paul Hamlyn Foundation (PHF), which is a highly-regarded grant-maker, has agreed to be examined as the case study for the roundtable. PHF has recently taken significant steps to strengthen its approach to monitoring and evaluation, and lessons learned from this work are likely to be valuable to other funders.
- 2.3 As part of its work towards the roundtable, IVAR will also prepare a think piece on evaluation for strategic learning, drawing together lessons from the wider charitable environment both in the UK and US.

3.0 Cost

- 3.1 The total cost of the research studies and the roundtable meeting is £38,000. IVAR will contribute £8,000 of its own funds towards the work, and several other funders have offered support towards the project. You are asked to contribute £5,000 which is equivalent to the level of support offered by grant-makers of similar size.

4.0 Allocation from Strategic Initiatives

4.1 It is proposed that the cost of £5,000 is charged against your 2013/14 allocation for Strategic Initiatives of £747,500 (5% of the overall grants budget). If you approve this request, there will be a balance of £183,613 remaining for the rest of the year (see Table 1 below).

Table 1: Strategic initiatives 2013/14

Strategic Initiatives	Committee date	£
Allocation of 5% of 2013/14 grants budget		747,500
Already agreed in this financial year:		
Access and Sustainability Service	18/04/2013	192,900
Ladder for London	06/06/2013	84,230
Lord Mayor's Show	06/06/2013	29,227
City Philanthropy Book	06/06/2013	15,000
Web-based database of volunteer intermediaries	04/07/2013	6,000
Youth & Philanthropy Initiative		48,330
Practical Guide for Charity Chairs		8,200
Learning & Knowledge Sharing Strategy 2013/14		175,000
	Total	558,887
Recommended at this meeting		
UK Evaluation Roundtable		5,000
Balance remaining		183,613

5.0 Conclusion

5.1 IVAR has identified a practical approach to helping charitable grant-makers share their evaluation approaches with one another, and use this exchange as the basis for structured learning and improvement. The UK Evaluation Roundtable is likely to generate many ideas that City Bridge Trust will be able to apply to its own monitoring and evaluation activities.

5.2 The involvement of the US-based Centre for Evaluation Innovation will ensure that the UK roundtable is based on a well-tested model. 15 grant-makers have already committed to the project, many of whom are recognised as leading institutions in evaluation practice.

6.0 Recommendation

That the Institute for Voluntary Action Research is commissioned to convene the inaugural UK Evaluation Roundtable for charitable trusts and foundations, at a cost of £5,000, to be charged against the City Bridge Trust Strategic Initiatives allocation for 2013/14.

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