

Agenda Item 8

Date 22 June 2023

Title Monitoring, Evaluation and Learning Strategy

1.0 Purpose of paper

For Trustees to hear more about our evolving approach to Monitoring, Evaluation and Learning as part of the new five-year strategy.

2.0 Summary

The adoption of the new five-year strategy provided a good opportunity for us to look at our approach to MEL (Monitoring, Learning and Evaluation) and how we want to understand the contribution that we have made to the work of the organisations we support. This paper highlights some key considerations for the design of the new approach to MEL and shares some of the documents that have already been developed.

- With the new strategy focusing solely on young offenders we have the opportunity to understand more clearly the impact that our support is contributing to.
- Our goals for the new strategy are that ‘the lives of disadvantaged young people at risk of having their futures disrupted by the criminal justice system are transformed’ through a reduction in reoffending rates for young people and a reduction in first offences for high-risk young people on the edge of the criminal justice system.
- Over the last two years we have already made some changes to the reporting processes for grantees both in terms of timings, the format of the reports they use and the information they send us at the beginning of their grant about the targets they will be aiming to achieve. This has helped to identify relevant and more consistent targets alongside providing information that is clearer and easier to compare to initial achievements.
- Feedback to grantees about their end of year reports has been instigated as a way of helping to identify challenges, ask questions and celebrate successes.
- Any new systems will be rooted in only asking grantees for information we need and will use, framing our reporting requirements in a way that isn’t overly onerous but also helps grantees to reflect on their work and adds value to their project delivery.
- Developing relationships with grantees is an important part of a MEL approach and these relationships should underpin a trust-based approach.

3.0 Actions

Trustees are requested to

- (i) Read and consider the new approach to reporting and capturing data linked to the impact of our grant making
- (ii) Share any thoughts they have about the suggested approach.

4.0 Supporting information

- 4.1 Collecting consistent impact data from grantees has been a big challenge for the Trust both due to the quality of the reporting that we have often received and the way that we have asked for this data to be submitted.

Despite having a long track record of grant making we have little evidence of the difference that the Trust has made over the past 70 years or so, other than anecdotal. And whilst visits to projects shine a spotlight on the great work that is being done it has been hard to collectively understand the wider impact.

Now that we have a strategy that focuses on one specific area this provides a good opportunity to rethink our approach to monitoring, evaluation and learning and ensure that going forward we have the ability to collect, understand and share the data that we receive more effectively.

Since 2021 we have had a Theory of Change that has been linked to our strategies and this has helped us to think more clearly about what the overall goals and aims of our funding are. As part of the strategy and Theory of Change we have clearly articulated that we want to share more widely information about the projects we support, what works and the impact that we are contributing to. We are also at the beginning of a big project to completely overhaul our CRM system and part of the rationale behind the design of a new system is linked to the ability to better record impact data. Now therefore is a key time to be developing new processes that can be built into the design brief for our new version of Salesforce.

The advent of the pandemic forced most funders to both start doing things differently and to think about why they do things the way they do. Due to an imposed distance between funder and grantee and the need to do things quicker than usual the concept of more trust-based relationships became a key component in lots of grant making. This has contributed to a significant review of the purpose of reporting by many funders and the Association of Charitable Foundations (ACF) published a members briefing in May 2023 around Improving Grant Reporting.

4.2 Current approach

In 2021 we made some changes to the reporting documents that we use. Rather than at the beginning of the grant asking grantees to identify their key achievements for the full period of the grant (usually three years) we instead asked for key achievements for the first 12 months to be identified. This meant that at the end of the first-year grantees reported back against these specific areas and if appropriate identified new key achievements for the next year of funding. The aim of this was to keep the reports relevant to the work that would take place over that 12 months and enable more realistic achievements to be identified for the following year based on what had already been achieved.

There was also more time spent with grantees at the assessment meeting talking through the key achievements to ensure that they felt realistic and achievable and that they clearly demonstrated indicators that would show progress towards these achievements. The overall strategy and programme aims were also included in the document to ensure that achievements linked clearly back to these.

Additionally, six-month progress reports were instigated that linked to annual payments being split into two instalments also. The driver behind this was mainly due to the poor quality of reports that were being received at the end of each year and a number of disappointing end of grant reports where the intended outcomes hadn't been achieved. When reviewing these reports, it felt like there had not been enough opportunities for Triangle Trust to pick up on issues related to progress against outcomes but that grantees were also picking up on this issue too late to be able to do anything to resolve or flag this. By asking people to spend some time at the six-month point of the grant each year it was hoped that this would provide an opportunity for reflection about how much progress is being made and a chance to assess if any changes needed to be made if anything was off track. The six-month reports have to date been an effective way of enabling grantees to spend some time thinking about their progress in a way that they might not have done otherwise. We have seen grantees recognise where unexpected challenges have had an impact on timelines, proposed ways of doing things and beneficiary numbers and this has led to positive conversations about how to address this and make changes to outputs and targets. It is unlikely that without engaging in this exercise that some of these challenges would have been flagged before the end of year report. Therefore, this feels like it has been an effective addition to our reporting processes.

At the end of the year feedback is provided to each grantee based on the annual report that they have submitted. The purpose of this is to recognise the work that has taken place, celebrate successes and to highlight any challenges that suggest that the planned outcomes for the grant might not be met. This is also a way of suggesting ways to grantees of how they might be able to strengthen areas of weakness such as introducing them to other grantees who have done well in those areas or encouraging them to rethink their approach. Being able to review grant reports for cohorts working towards the same kind of outcomes enables us to pull together common themes and understand patterns and emerging trends that can be shared with others. All of which hopefully has the ability to enhance the work that grantees are doing and helps them to reflect on the impact they are making.

4.3 **Planned way forward**

Whilst the systems that we have in place have certainly improved the quality of the reporting that we receive it can still be hard to fully join up the outcomes that grantees are achieving, even despite them working towards consistent strategy and programme aims. This is because their approaches can vary hugely and the way that they describe and identify indicators and outcomes can be very different. We are therefore unable to pull out common impact areas as the initial reporting form that forms the basis of the end of year reports are still very open in terms of projects describing what they want to achieve.

As a way of addressing this, significant work has taken place to identify common social impact areas that can be used by grantees to identify how they are going to support young people to make changes to their lives which will contribute to them either reducing offending or not committing a first offence (**Appendix 1**). Five social impact areas have been identified; individual development; health and wellbeing;

employability; education; and social and community cohesion and within each of these a set of outcomes have been developed. Prior to the assessment visit we will ask grantees to identify up to three social impact areas that they will target and within each of these up to three changes they will identify and report against. This will provide us with a set of consistent impact areas and linked outcomes that we can collect data against, which will help us to build up a wider picture across each cohort about the difference they are making.

These five social impact areas and outcome examples have been identified through research and discussion with organisations such as InFocus, Alliance of Sport in Criminal Justice, other funders, and a number of front-line organisations working with young offenders and those at extremely high risk of entering the criminal justice system. They pick up consistent themes linked to areas commonly recognised as contributing to a young person being able to move away from offending behaviour.

The documents that grantees will use for their reporting have been designed to be clear, easy to complete and capable of extracting data from in a consistent way. This will support our ability to capture information about our funding and the impact we are contributing to which will help to inform our ongoing strategy development and enable us to share widely what we are doing. Reporting forms will only include information that we will use to help with our strategy delivery and development and that grantees can use to reflect on their progress going forward.

We will continue to ask grantees to complete a short progress report at the six-month point of each year of their grant (as this has shown to be effective in encouraging people to think about how they are doing and flags challenges in a positive way) and written feedback will also continue to be provided at the end of each year. Alongside this though continuing to build positive relationships with grantees that are based on trust and the desire to provide support will underpin our approach to monitoring, evaluation, and learning. We will continue to do assessment visits in person wherever possible to build those relationships at the earliest points and ensure that all grantees understand that we are a supportive and accessible funder.

5.0 Next steps

A new Monitoring, Evaluation and Learning strategy for the next five years will be brought to the October 2023 Trustee meeting.

		Choose a minimum of three changes linked to each Social Impact area you will report against								
Social Impact area		1	2	3	4	5	6	7	8	9
Choose up to three social impact areas that you will report against	A									
	Individual Development	Improved self-efficacy	Improved self-esteem	Improved motivation	Improved managing emotions	Improved resilience	Improved social skills	Improved life skills	Improved self-discipline	Improved team work
	B									
	Health and Wellbeing	Improved mental wellbeing	Positive health behaviour	Reduced substance misuse	Increased physical activity	Improved family relationships	Improved daily routines	Improved ability to avoid negative relationships		
	C									
	Employability	Enhanced career prospects	Enhanced employability skills	Young people gain work experience	Increase in self employment	Increase in sustained employment	Increased aspirations and career goals			
	D									
	Education	Improved cognitive functioning	Improved access to education	Improved attendance at school or college	Increased motivation and engagement in school or college	Fewer discipline problems	Reduced school or college dropout rates	Improved educational attainment and achieving qualifications		
E										
Social and Community Cohesion	Increased social capital and trust	Increased volunteering	Reduced anti-social behaviour	Reduced gang participation	Improved cultural awareness of participants					

How to use the matrix

You will need to choose up to **three** Social Impact areas to report against from the areas listed in A-E.

Once you have identified your Social Impact areas you will then need to choose a **minimum of three** changes (listed 1-9) in each area to demonstrate how you are making a difference to the lives of the young people that you are working with and how this is contributing to them not reoffending.

For each of these areas you will need to tell us how you will show that you are making a difference in this area. This might include how you will measure this, identifying actual changes that you will see and explaining the activities that you will undertake to achieve these changes.