Yorkshire Funders

Monitoring, Evaluation and Learning Workshop

Thursday 9th October 2025, 10-12 noon online

Session delivered by:

- Erwin Hieltjes-Rigamonti – Director, Data & Impact at New Philanthropy Capital (NPC)

My contact is Erwin.Hieltjes@thinkNPC.org in case anyone wants to follow-up on anything. For our resources see: https://www.thinknpc.org/effective-philanthropy-and-grant-making/

- Gemma Brookes – Impact Manager - North, Children in Need (CIN)

Session overview

In this session, we will provide an overview for how MEL can be done in ways which are more trusting and equitable, whilst providing the right kind of evidence and insights to improve your practice.

Session Summary

NPC is a not-for-profit – here to grow and strengthen the charity sector. They do strategy work with funders, programme development, help with MEL development, funder plus and also help with due diligence and the operational side of grantmaking.

NPC's 'Monitoring, Evaluation and Learning with trust and equity' report

Funders want to know everything and have all kinds of questions – asking these questions comes at no costs to them. But the costs fall to the charity and there is a power imbalance.

There is a movement towards more trust-based funding. Traditionally, grantmaking is more transactional (one programme) but then moving to core funding – but with that comes more trust – not asking for data to check but trust that grantees use the money well. That movement towards trust does bring its own downsides – more difficult to have data on impact or know whether your money is spent well. There may not be the evidence of this.

We try to offer a framework to help funders to think about what works best for them and their grantees.

<u>Q: Is this a dilemma that people have? Do others recognise this?</u>

Perhaps one of our donors wants specific information – but some donors are more trusting and open – they may simply request a report which is more anecdotal and can be provided easily. Photos can be used to provide evidence (e.g. if something has been purchased.)

We get the data but often because there is lots of different projects, it is tricky to aggregate to communicate with others to highlight impact.

Our reporting is open and trusting – we ask general questions and feedback – a page or 2 – we do read them and summarise with trustees. We aren't so good at feeding back to grantees. We are at the point where we need more data for reporting, so we are almost going the other way – but still want as light a touch as possible.

Whilst we always work to read and respond to every report, our challenges are in how we aggregate the insight and learning shared into something we use strategically to think about and shape our own approach.

NPC's report will be shared by email afterwards – 4 chapters:

- 1) Setting your intentions
- 2) Where wo look
- 3) How to gather evidence
- 4) Making the most of it

<u>Setting your Intentions</u>
Think about the role of MEL in your organisation and the type of funder you are.
NPC has created six architypes of funder to encourage funders to consider what kind of funder they are and how that influences how their MEL should be set up.
Consider – who is your audience for MEL? What kind of data are needed and crucially why?
Then think about what you bring to the table (who you are and how you fund) and the work you aim to support (who you fund and what you want to achieve)
Be intentional about what you want to learn – prioritise what you are most interested in, ask thematic and organisational questions and always with an equity lens.

<u>Where to look</u>
Besides looking at your grants, assess your own practice (how effective is your support, how well are your processes working) and look outwards for external evidence – the wider landscape and your role within it.
(See slides for considerations in each of these areas)
It does take a mindset shift, especially with trustees to not overburden grantholders and use other evidence – but it's worth it – the information is often a lot more robust than what you'd be able to collect on your own.

<u>How to gather your evidence</u>
Be proportional – flex your requirements based on your knowledge of grant-holders (size, sector & type), you as a funder (what's at stake, capacity and resources), grant type (value and length)

Tailor your requirements – it is better not to ask same questions in a blanket approach if there are significant differences between grantees. Sometimes it's better to ask for only a little information and then up the requirements if needed.

How to gather evidence – ask whether they've already written something for someone else? Consider oral evidence gathering – visits, check-in calls, group conversations, learning event.
Make sure the method you choose matches what you want and need to know. Consider data quality.
Reflect on how power dynamics will shape the data you receive.

<u>Making the most of it</u>
If you go to the trouble of collecting a lot of information, make sure you have the time and skill to do the analysis.
Create space for learning – time for learning and reflection is important
Be accountable for the learning you do – share and publish what you are learning.

In summary, core principles of equitable and trusting MEL?

- Being intentional
- Assessing more than the grants – turning the lens
- Bring in other voices
- Be proportional
- Pick appropriate methods and approaches
- Make the most of evidence for you and others

See slides for other reports and further reading
NPC's report on embedding DEI in the grant-making cycle: https://www.thinknpc.org/resource-hub/dei-in-grantmaking/

Breakout group feedback

1) What role does evidence play in your organisation? And who sees the evidence?

Evidence goes to trustees, staff – those who are administering on behalf of another organisation restricted in terms of flexibility (e.g. what they can ask)

Where trustees are finance people, they often want a lot of numerical data – hard to convert actions and outcomes into numbers.

It should be about getting the voice of the beneficiary – for us it's not about quantitive but qualitative – a quote, a case study, a photo can be far more powerful and can tell you a lot – but convincing trustees can be challenging.

Re the financial challenge – we've been asked "can you put a social value pound on what you are doing" and we are nowhere near being able to do that. Is anyone doing that and is it possible? I do know an energy funder, they presume that for every person they help, they will go on to help 7 others. NPC response– we hear this more and more but the high level, please push back and ask why they want this and why it's important – you can only calculate if you have lots of data which is a big investment – they need to know it's not a simple process to do properly.

Re social value, we (council member) have a team that work on social value (we worked with Social Value Engine https://socialvalueengine.com/) – they have an agile online tool to forecast this.

Re pushing back on trustees, we've done a lot of training as a staff team on EDI, IVAR O&T etc but that isn't any good if we don't take the trustees on the journey too – we have been doing training as part of board development to help take them on that journey.

2) What external data sources do you draw on to understand the issue, understand what is effective, and understand your role?

No groups discussed this question.

3) How do you consider proportionality in your reporting requirements?

Everybody in our group on the same page – if under £5k, being very trusting – not asking for too much information. We give out other people's funding so we push back and ask questions if the reporting requirements are excessive.

Whatever it means to you is dependent on the size of your grants and what is a large or small grant to you.

NPC comment - If nobody is drawing on external evidence, I can highly recommend taking a look at that. It's super powerful if you can satisfy trustee and funders needs with evidence out there, so you don't need to collect burdensome information from grant holders!

4) How do you share what you are learning with your grant holders and other stakeholders?

When we meet with our grantees, we share learnings from others if appropriate and sometimes put them in touch with each other informally.

Similar in our group – we spoke about the challenge of flow of information – reflecting back to grantees and recognising what they'd shared to us. This gets more sticky as it flows up the organisation to trustees. At our organisation it stops there – the information stays within the organisation – we should think about sharing that out as a place-based funder.

Everyone in our group was doing some work on communicating – e.g. newsletters, meetings with grantholders to feedback insights. It's always more difficult higher up however.

We did an anonymous survey – whether you'd applied and been successful or unsuccessful. Children in Need does an annual survey as well – it is useful, but I'm not sure we do enough with the feedback.

Grant advisor is a good toll to collect applicant feedback - https://www.grantadvisor.org.uk/

Centre for effective philanthropy are a good source for supporting keeping things anonymous

Children in Need – How they overhauled their reporting system

2 ½ years ago we paused our grantmaking to review our strategy – reviewing everything for grantees, staff, reporting.

We realised we were asking disproportionate questions compared to amount of funding we were giving (small grants up to £5k). Our reporting was the same for small grants under £5k right up to largest at £120k.
We stripped everything back and started from scratch.
What do we actually want to know? What's nice to have? Who needs what and why?
We asked all different departments and teams.
We got rid of the questions where we were just being nosey and were left with what was a necessity – more reliance on transparency and trust.

We put in the questions we needed to have – we took our questions through Arabella checklist (Recommendations for Incorporating DEI in Grant-Making Practice | Arabella Advisors) – this is about how you are building DEI into your reporting system.
We also took every question through the Hemmingway app (free) –Hemingway Editor- type in the question and it rates it on accessibility.
All our questions were then in plain English and as accessible as we could make them.

We wanted to be transparent along the lines of IVAR O&T guidelines – in our questions, we had a pop-up with an explanation of why it's needed and who needs the information.

The biggest change for us was around budget – we took the detail out and asked "have you spent your budget in the way you said you would" and then an open text box for explanation and discussion if not.

We changed the report as well according to grant amount – the larger amounts only had a few more questions. Smaller amount we ask for one outcome, larger we ask for three.
We mainly fund up to 3 years – we've added slightly different questions – in the year 1 report we've added a question to see where they are at, accepting that things can get time to get going. The year 2 is the chunky one. The year 3 is like an exit report.

We included questions on core funding – we ask around how funding contributes towards core organisational costs and also wider community issues.

We trialled it with 10 organisations (and really thought about the ten).
We followed up with a few questions – some narrative and importantly asking how long it took to complete (answer was between 20 minutes and 10 hours due to visual impairment). We then changed one of our reporting templates to a larger font. We also have the option for us to fill in the form with them – they can flag accessibility issues when they open the report.
On average, it's taking around 1 hour to fill in the reporting form – this is reduced from around 7-8 previously.

We've been using for over a year. A couple of questions don't work any more and needing tweaking. We have a year's data now and so are considering anything else to change.

Biggest tip – give yourself permission to sit back and reevaluate. Be as plain, simple and transparent as possible – even if you just take your questions through the Hemmingway app, that is progress.

Feedback to Yorkshire Funders

If you have got any questions, feedback, top tips, links etc on any of this please get in touch as Yorkshire Funders knows our members are sources of incredible insights and knowledge that is valuable to others.

Get in touch via Alex, Alex@yorkshirefunders.org.uk