

Monitoring, evaluation, and learning with trust and equity

Erwin Hieltjes-Rigamonti

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NPC: believing in the power of a growing impact economy

As a think tank and consultancy with purpose we work to grow and strengthen the impact economy. We do this through:

Convening and
influencing

Bringing change
through
consultancy

Sharing our
learning as we
go

Collaborating on
projects for
change

Some common frustrations...



'I don't know if [funders] read reports to be honest. They probably read the first couple of paragraphs and then lose interest and onto the next one... Why are we wasting our time doing these massive reports that get skimmed over?'

Fundraiser, International Environmental Charity

About this session



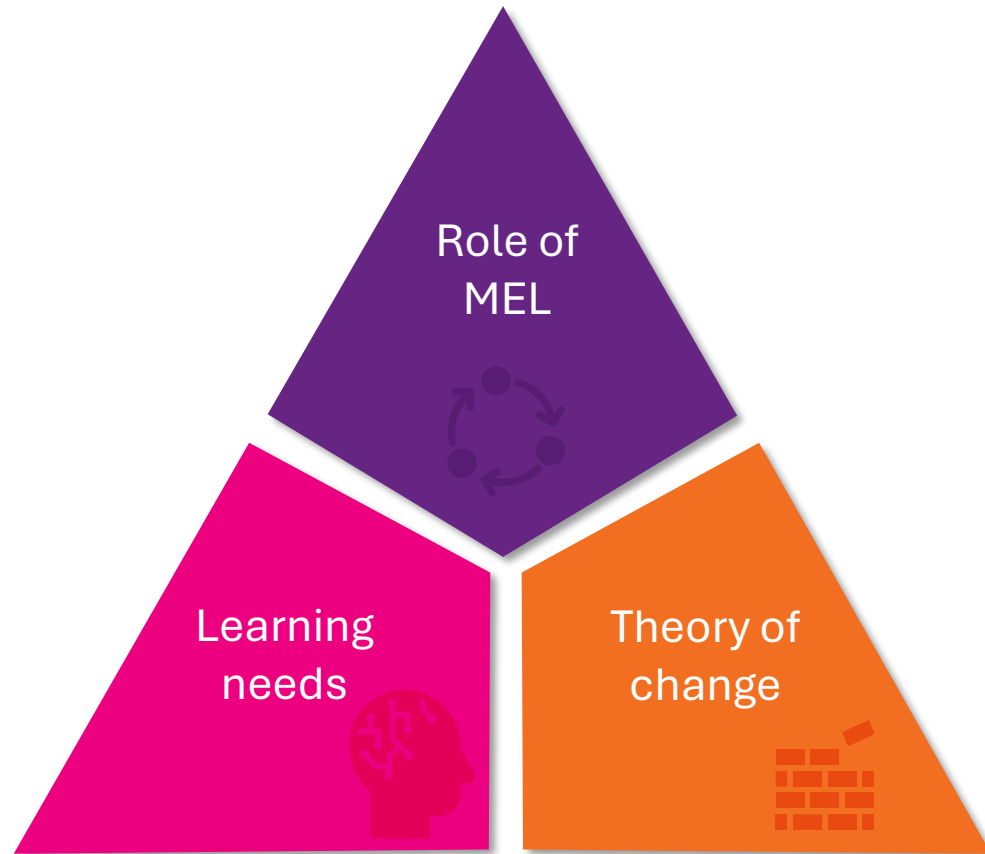
What does an equitable and trusting approach look like?

Our core principles

- Being **intentional** is the foundation for a trusting and equitable approach
- MEL is about **more than assessing the impact of your grants**
- **Proportionality** is at the heart of good monitoring & evaluation practice
- Approaches and methods must **fit** evidence and learning needs
- **Make the most of evidence** both for you and for others
- Bring in **other voices**

1. Setting your intentions

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Role of MEL

Be clear about the kind of funder you are, & what kinds of data are needed, for whom, and why.

Theory of change

Consider two levels, what you bring to the table as a funder, the work you aim to support.

Learning needs

Identify learning questions.

1. Setting your intentions: the role of MEL

**What
kind of
funder
are
you?**

The evidence builder



Invests heavily in research and evaluation and takes a flexible approach to monitoring. Develops platform and voice to share insights.

The capacity builder



Focuses on strengthening organisations through additional non-grant, or 'funder plus', support. Need to evaluate & understand impact of their offer & how to improve it.

The long-term funder



Funds unrestricted grants over the long-term, not open to applications. Strong emphasis on monitoring and assessing how individual grants are doing.

The systems funder



Takes a deep learning approach and will need to look externally to understand their role in the system.

The fundraising funder



Will need to demonstrate their effectiveness to their funders. Often means a focus on gathering consistent data from grant-holders.

The large-scale funder



Need to understand the effectiveness and equity of their processes. Look to gather and aggregate insights from across their portfolio.

1. Setting your intentions: the role of MEL

Who are your audiences?

- Internal decision-makers
- Your trustees
- Your funders
- Grant-holders
- The wider sector
- Policymakers or practitioners
- The communities you serve

What kinds of data are needed, and why?

- What is needed for accountability, decision-making, learning or communication purposes?
- What kinds of evidence are essential vs what's nice to have?
- To what extent can evidence needs be shifted?

1. Setting your intentions: using a theory of change

1. What you bring to the table		2. The work you aim to support	
Who you are	How you fund	Who you fund	What you want to achieve
Values or qualities you bring to your work The role you seek to play e.g. convenor, evidence-builder	The type of funding you provide Other assets you deploy e.g. network, influence, investment Any 'funder plus' support	Type of organisation Type of activities e.g. service delivery, advocacy The people, communities, or eco-systems you want to support	The short-term and longer-term changes you hope to see for: • the organisations you fund • the wider field • the people, communities or eco-systems you support

1. Setting your intentions: what do you want to learn?

Thematic questions

- What are the wider factors influencing change in this area?
- What do we know is most effective in supporting our communities?

Taking an equity lens

- How are different groups affected by the issues we are trying to address?

Organisational questions

- How are organisations experiencing our support?
- Are we identifying and selecting the right organisations?

Taking an equity lens

- Is our funding going to the groups experiencing the most disadvantage?

Can you think of two questions which could help you be more effective?

Discussion questions (for later)

1. Setting your intentions

- What kind of funder are you?
- What role does evidence play?
- What are your key learning questions?

2. Where to look?

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Your grants

Focus on the whole organisation, its impact, how it understands what it's achieving, & what it's learning.



Turn the lens

Assess your own practice, drawing on a range of evidence & perspectives.



Look outwards

Draw on external evidence to understand the issues, what's effective, the wider landscape, and your role within it.

2. Where to look? Your grants

Key questions

- What impact is the organisation having, and how does it know?
- What impact has our grant had on the organisation?
- How is the organisation doing?
- What is the organisation learning?

2. Where to look? Turn the lens

1. Where are your grants going?

- **DEI Data Standard** – how equitably your funds are being distributed
- Examining the **geographical spread** of your grant making, categorising grants using the **Index for Multiple Deprivation**

2. How well are your processes working?

- **Internal data** – insights on the application process
- **Grantee survey**
- **Independent review** – to assess strengths and areas for development
- **The Foundation Practice Rating** – opt-in to be reviewed and assessed in relation to diversity, accountability and transparency

3. How effective is your support?

- **Monitoring take up and feedback on the quality** of any funder plus support you offer

2. Where to look? Look outwards

Understanding the issues

- Undertaking a desk review
- Learning from people with lived experience, professionals or practitioners, academics or other funders.
- System mapping to identify levers for change

Understanding what is effective

- Undertaking a desk review
- Reviewing evidence from the What Works Centres or NPC's Data Labs
- Talking to stakeholders.

Understanding your role

- Engagement in networks of funders – Environmental Funders Network or the Association for Charitable Foundation networks.
- System mapping on focusing on the actors within a system

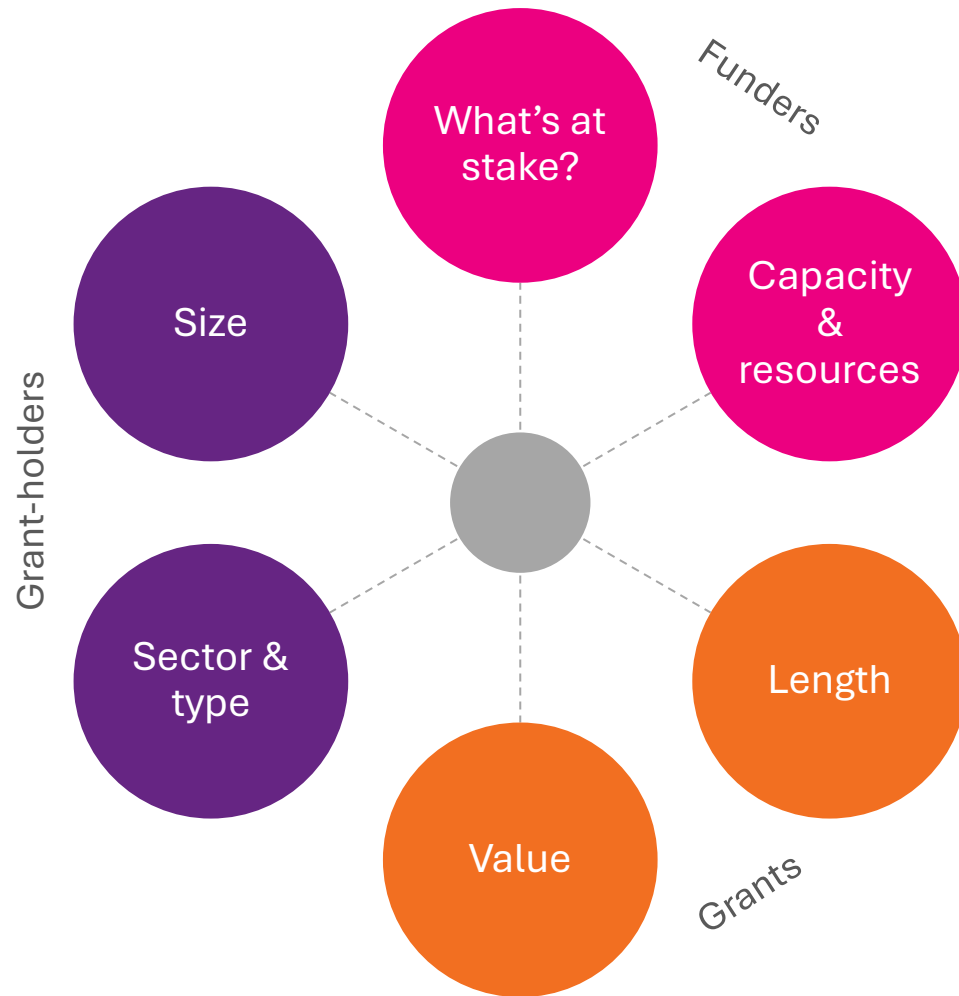
Discussion questions (for later)

2. Where to look?

- Are you asking the right questions of your grant holders?
- How do you turn the lens on your own practice?
- What external data sources do you draw on to understand the issue, understand what is effective, and understand your role?

3. How to gather evidence?

3. How to gather evidence? Be proportional

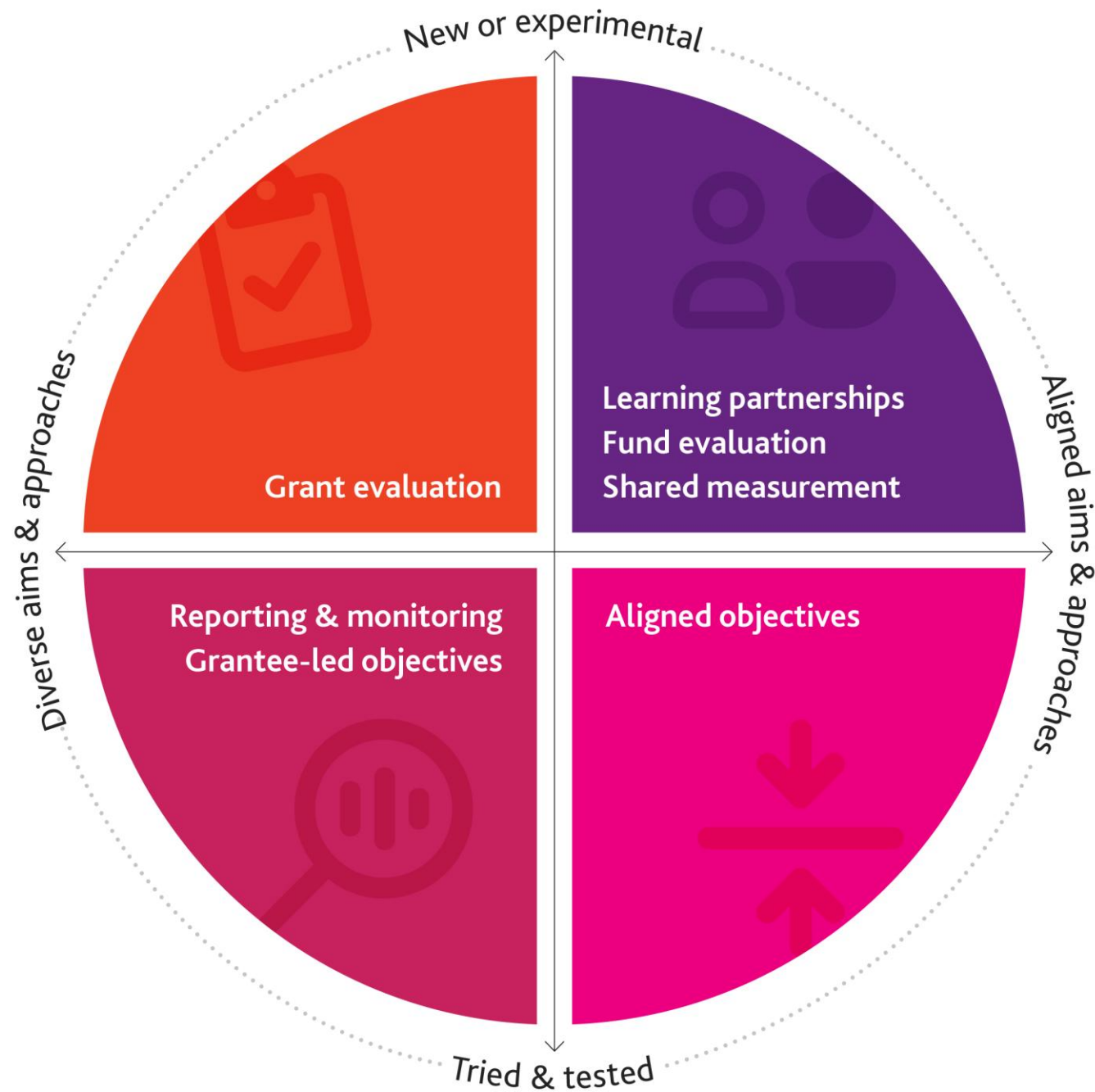


Proportionality in practice

- Tailor requirements where there are significant differences
- Sometimes it might mean collecting more evidence, not just stripping requirements back
- Engage with grant-holders to try strike the right balance
- Be clear and transparent around expectations (particularly if open-ended) & share examples where possible

3. How to gather evidence?

Selecting your approach



How to gather your evidence: identifying the right sources?

Evidence sources

Written

Tailored report
Existing report
Publicly-available info
Survey
Raw data

Oral

Visit
Check-in call
Group conversation
Learning event

Tips for picking the right ones

- Match your methods to what you want & need to know.
- Consider data quality, understood in broad terms.
- Reflect on how power dynamics will shape the data you receive.

Discussion questions (for later)

3. How to gather evidence?

- How do you consider proportionality in your reporting requirements?
- Do you differ approaches between new & experimental programmes vs. tried & tested programmes?
- Do you ask grant holders how they prefer reporting back?

4. Making the most of it

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Invest in analysis

Time & skills for analysis

Consider who is doing the analysis?

Store and collect data in ways that enable analysis

Develop frameworks for analysis



Source: [Ellen MacArthur Cancer Trust Dashboard, by TrustImpact](#)

4. Making the most of it

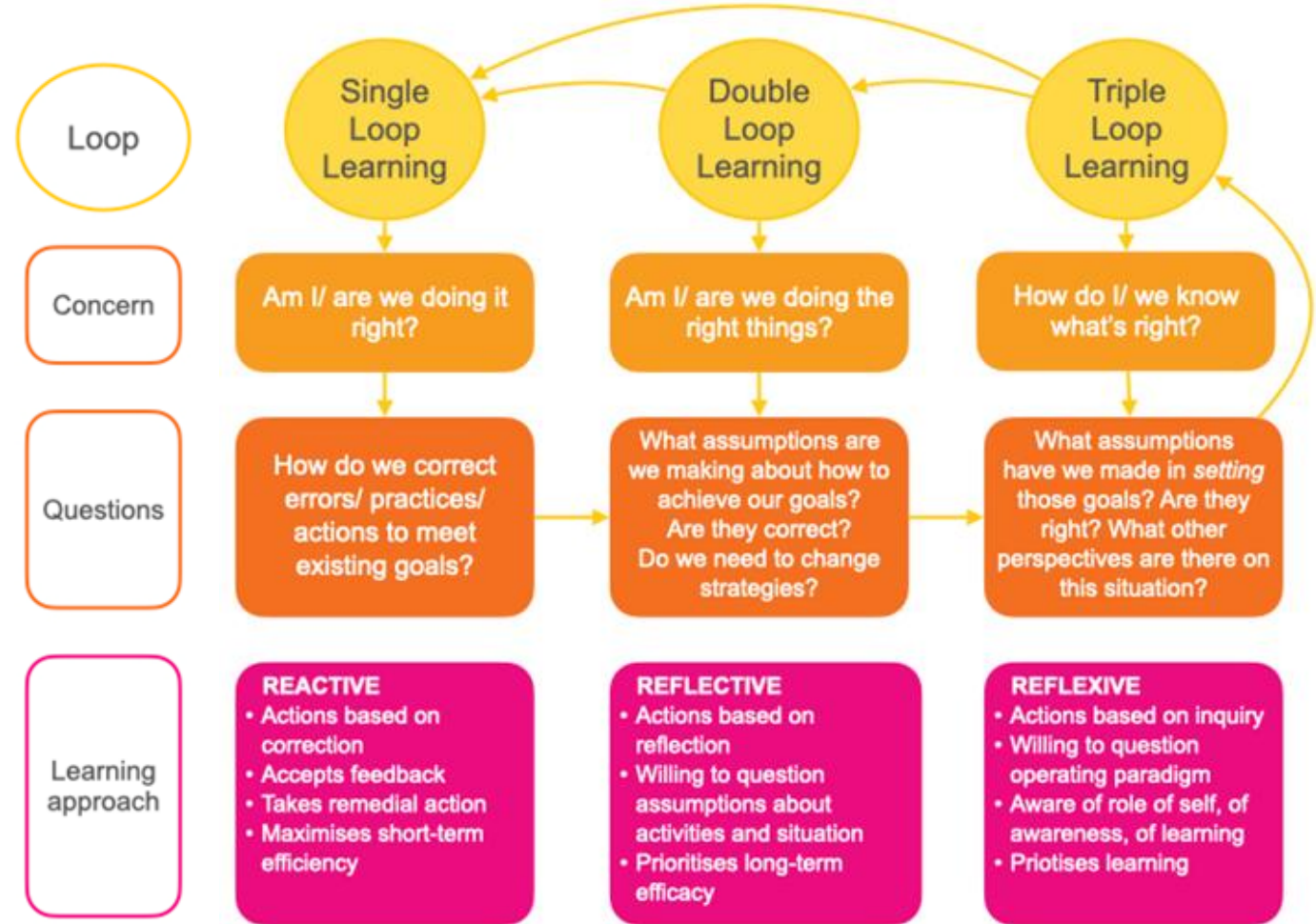
Create space for learning

Provide time for learning & reflection

Build a rhythm to your learning

Leave space for creativity

Make space for reflexivity



Source: [Triple Loop Learning Model, Systems Practice Toolkit](#)

4. Making the most of it

Be accountable for learning

Publish & share your data

Talk about what you're learning

Let people know what you will do as a result

1/3/24
SDS

LONG TERM INDICATORS

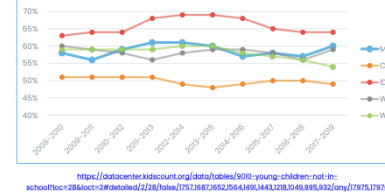
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OUR INTENDED LONG-TERM IMPACT:

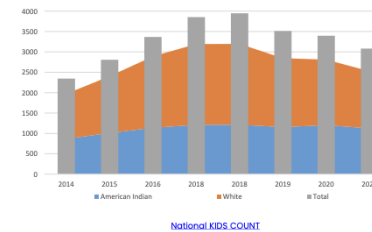
Reduced social and economic barriers that keep Western Montanans from being healthy, particularly for families living in poverty and American Indians.

FAMILY RESILIENCY & EARLY CHILDHOOD

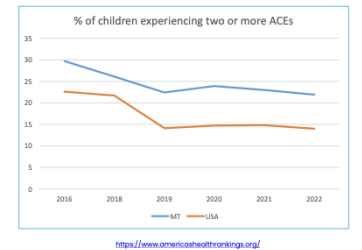
Children ages 3 to 4 not enrolled in school, including nursery school, preschool school or kindergarten, during the previous three months



Children in foster care by race in Montana



Montana ranks 48/50 for adverse childhood experiences by state, followed by Wyoming and New Mexico.



HOUSING SECURITY <https://nlhrc.org/housing-needs-by-state/montana>

KEY FACTS

28,632
OR
21%

Renter households that are extremely low income

-15,741

Shortage of rental homes affordable and available for extremely low income renters

\$26,500

Maximum income for 4-person extremely low income household (state level)

\$40,098

Annual household income needed to afford a two-bedroom rental home at HUD's Fair Market Rent.

65%

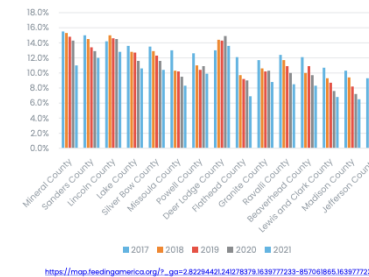
Percent of extremely low income renter households with severe cost burden

TRUSTED DATA SOURCES

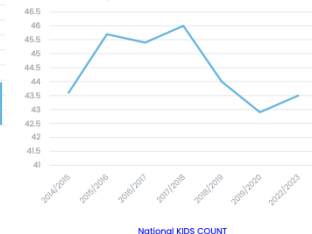
- County Health Rankings & Roadmaps (University of Wisconsin-Madison Population Health Institute & the Robert Wood Johnson Foundation)
- America's Health Rankings (United Health Foundation)
- Community Opportunity Map (Casey Family Programs)
- Kids Count (Annie E. Casey Foundation)
- Feeding America
- Montana Department of Public Health & Human Services, Interactive Dashboards

FOOD SECURITY

Percent Food Insecure



% eligible recipients of free or reduced price lunch, Montana



Source: [Headwaters Foundation 2023 Learning Book](#)

Discussion questions (for later)

4. Making the most of it

- How useful is all the data you ask for?
- How much time do you spend on learning and reflecting?
- How do you share what you are learning with your grant holders and other stakeholders?



What resonated with you most?

What are the things you might want to change going forward?

What are the quick wins?

Further reading

Featured resources on philanthropy and grant-making



[Resources](#)

How to embed DEI into your grant-making cycle



[Resources](#)

A rebalancing act: How funders can address power dynamics



[Resources](#)

Monitoring, evaluation, and learning with trust and equity: a guide for grant-makers and philanthropists

