

Calouste Gulbenkian Foundation (UK Branch)

How we Work: a Briefing Note for Partners

The UK Branch's purpose is to help enrich and connect the experiences of people in the UK and Ireland and secure lasting and beneficial change, focusing on three key themes: cultural understanding, fulfilling potential, and protecting and caring for the environment. We see ourselves as a strategic investor, working in partnership with other organisations operating in these areas in pursuit of shared goals to achieve significant change. This note sets out our ambitions and expectations in building and maintaining successful partnerships.

Types of partnership

Partnerships can operate in many different ways and at different levels. Usually we partner with other agencies to develop and fund new programmes of work. Increasingly, we are interested in co-design and co-delivery – for example, our development of the IntergenerationAll Programme in partnership with social design agency Thinkpublic. Within programmes, we make some grants to develop and trial new approaches. We also commission existing organisations or foster new ones to address specific issues or unmet needs – for example, coalitions, such as Making Every Adult Matter, campaigns, such as the Campaign to End Loneliness, or occasionally start-ups. (See case studies.) Occasionally, we support projects which are brought to us by organisations seeking funding but the majority of our funding is now proactive rather than reactive.

What the Foundation can offer

We know that each partner will bring differing assets which add value to the relationship. While our partner organisations offer skills and expertise to deliver programmes of work which will create lasting value, we can also bring a number of strengths to the partnership. We can offer advice and support based on our understanding of social and cultural affairs in our key areas of focus; we can often facilitate connections between organisations, bringing together effective communities of practice; we can help discern and disseminate the lessons from work we are supporting; and we can challenge our partners, where appropriate, to be more ambitious for their work. We recognise that with the Foundation as the funder, or one of a number of funders, the partnership may not be a completely equal relationship. We have a proportionate approach, so that our expectations of a partnership are in line with the level of our support.

The principles of successful partnership working

The principles that apply to our work with organisations we support include:

- a shared commitment to goals and an ambition to achieve change;
- a shared understanding of the nature of the partnership, its purpose, objectives and duration, and what each partner will contribute;
- a mutual respect and developing trust maintained throughout the lifetime of the partnership and beyond, including through shared acknowledgement;
- open and honest communication with a willingness to share information, including about problems which may arise on either side so that the partners can deal with these together and learn from them;
- a mutual flexibility and responsiveness with a willingness to make changes to programmes in response to emerging evidence or changing needs and circumstances;
- a shared commitment to evaluation, learning and dissemination (see the briefing notes that follow on evaluation and on communications).

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Evaluation and Learning – Communications

Evaluation and learning

Evaluation is a shared tool for planning, learning and improvement which ultimately helps our partners and ourselves to increase the impact of our investment through a heightened understanding of the outcomes of the projects and programmes we fund and the ways in which those outcomes have been generated. Internally, we have developed a planning, monitoring and evaluation framework to help us collate the learning that is emerging from our various programmes, including looking at the effectiveness of investment and its overall impact. We usually expect those delivering projects to report against the plans we have agreed; sometimes it will be necessary to commission tailored evaluations of projects or groups of projects so we can compare the learning between similar projects. In all cases, we will want to discuss with partners the best approach to evaluation.

The purpose of evaluation

There can be many reasons to evaluate work but in our case, the primary objectives are:

1. to capture learning for the purposes of continuous improvement in the areas we fund;
2. to assess the impact and value of the projects and programmes we fund in order to make the case for future investment;
3. to monitor and manage progress against the objectives we set;
4. to aid transparency and accountability.

Some principles

The principles that apply to our approach include:

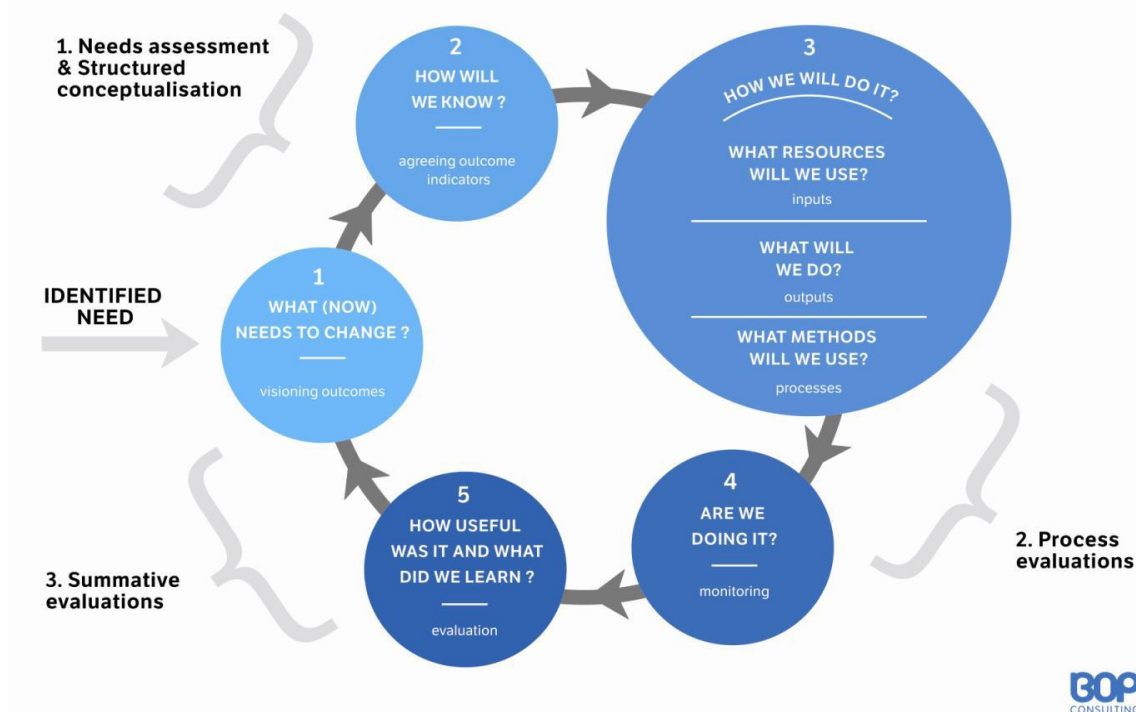
1. **Proportionality:** the amount of money, time and effort expended on evaluation should be in line with the nature and scale of the programme of work and the capacity of the organisation.
2. **Continuity:** we see evaluation as part of the learning process and as being central to all stages of a programme or project rather than a stand-alone activity or a process of reporting at the end.
3. **Causality:** we look for an explicit account of why and how activities may lead to changes in the real world.
4. **Outcomes focus:** we are interested in outcomes and impact – how attitudes have been altered, how knowledge and skills have been gained and, ultimately, how lives have been changed. There will be outcomes at every stage of a programme. Unexpected or unintended outcomes are valid too.
5. **Inclusivity and participation:** we value an approach to evaluation that involves the beneficiaries or users of a programme and shares the learning with all stakeholders to maximise its usefulness.
6. **Dissemination of learning:** we work with our partners to draw out the lessons from a programme or project through evaluation and to share them with others.
7. **Communities of practice:** we encourage the involvement of as many interested parties as possible at every stage so that learning can be widely disseminated.

The evaluation cycle

By adopting a staged and cyclical approach to programme or project development, we can build evaluation more systematically into every aspect of our work. The diagram on the next page shows the five main steps in an evaluation cycle and how these relate to different types of evaluation activity.

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The Evaluation Cycle: Key Questions and Activities



Key Terms

Inputs – the resources and processes (financial, human, material, technological) which are brought to bear upon the problem or issue.

Outputs – the ‘products and services’ produced by the programme. These will be workshops, training sessions, performances, works of art, curricula, and toolkits. Typical outputs indicators would be the numbers of events/performances and the number of people attending/participating.

Outcomes – the specific changes in the programme participants’ awareness, attitudes, knowledge, skills, situation and behaviour. Short-term outcomes should be observable in a 1-2 year span and would most likely relate to attitude, skills and knowledge within individuals and groups. Medium-term outcomes should be observable in a 3-5 year span. These would relate more to changed behaviour in individuals and groups or possibly to new policies or social action in society more broadly.

Impact – the long-term changes to the social, economic, environmental and civic environment. Only likely to be observable after 3 years or more: i.e. after the programme’s conclusion and not necessarily directly attributable to the programme. Typical indicators of long-term impact would be changes in legislation, changes in the socio-economic well-being of particular groups (employment, housing), changes in social behaviour (consumption patterns, civic engagement) and improvements to the existing situation (decrease in emissions). The desired impact of the programme should correspond directly to the aims of the programme and the funder.

Indicator – something – usually but not always a numerical value – which shows that a change has taken place. It is useful to measure the indicator at the start of a programme (to establish a ‘baseline’) and then again at the end.

Formative evaluation – takes place during the project or programme. Examines delivery, quality of implementation, organisational context, personnel, procedures and inputs. May also include early indication of outcomes.

Summative evaluation – mostly takes place towards the end of a project or programme. Assesses outcomes and impacts directly attributable to the programme and any broader outcomes and impacts. Can also include cost/benefit analysis.

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Communications and public affairs work

The Foundation is committed to maximising the beneficial impact of its funding and to bring about change. We are therefore keen to promote our partners' work and to collaborate with our partners on all communications and public affairs goals and strategies and on plans to share and disseminate learning from projects and programmes. Please liaise with Felicity Luard, the Foundation's Head of Communications (fluard@gulbenkian.org.uk), on all matters of communication, public affairs and shared learning.

Reports, research, publications, evaluations, videos etc

Please send the Foundation drafts of reports and other materials for comment before publication. We are happy to provide endorsements, including copy for introductions etc. where appropriate. We can also help with dissemination through our website and networks. Please provide at least one final copy of any funded report, publication, video, CD, programme, flyer etc.

Events

Please keep us up to date about events you are planning in connection with the work we are supporting, including conferences, launches, policy briefings and other gatherings. We may be able to host events at our Hoxton Square offices or make rooms available for meetings, round tables and seminars. Please invite the director or appropriate Gulbenkian personnel to events related to the supported programme.

Media campaigns and news

Please involve the Foundation in your media campaigns and inform us of publicity – good or bad – about the supported work. Please provide drafts of media releases for comment before issuing press statements about the supported work. We can provide a quote where applicable and a paragraph about the Foundation for the Notes to Editors.

Acknowledgements and logos

Please acknowledge the Foundation's support in all printed, electronic and other materials related to the funded programme (reports, leaflets, brochures, posters, written or spoken presentations, websites, videos, CDs, programmes etc.). Please use our full name 'Calouste Gulbenkian Foundation' in written acknowledgements and include our logo wherever appropriate, with the credit line: 'Supported by' above the logo. The logo and guidelines for usage can be obtained from the Foundation's Head of Communications or by emailing info@gulbenkian.org.uk. Please specify how you plan to use our logo and let us know if you require a particular format.

Foundation platforms and distribution channels

We can feature news items, short videos, media releases and information about events on our website, with appropriate links, and assist with distribution through our networks. We are increasingly seeking to include short videos on our website that will help us to share the lessons of your work. Where available, please also send us good quality digital images of your work for possible publication on our website, in our Annual Review, or in related publicity. Please ensure that you are able to grant us permission to publish the videos or images in this way and provide appropriate captions and credit lines. If supplying photographs of children under 18, a signed consent must be obtained from parents or guardians.