



Innovation and Learning Strategy
2016-2019

Our Innovation and Learning Strategy

This document details the Innovation and Learning Strategy and how it will help to deliver the organisation's overall strategy. Through our work, we have learned that there are some issues which cannot be addressed solely by providing awards to individual charities. This may be because of a need for:

- increased awareness or understanding of an issue or its causes
- increased evidence or understanding of approaches or interventions which are successful in addressing an issue
- increased capacity, skills or knowledge within the sector or individual charities to address the issue
- a collaborative and/or longer term approach to be taken to address the complexity or scale of the issue at a structural or system level

These reasons can prevent issues from being addressed effectively at both a policy and practice level often resulting in either no action or a series of short term, ineffective interventions. Where appropriate we also aim to take an "early action" approach where we try to tackle the root cause of a problem rather than the symptom.

Over the next three years, our vision for the Innovation and Learning Team, in line with the organisation wide outcomes is as follows:

1 Improved outcomes for Individuals and communities

- Support improved outcomes for individuals and communities directly through existing Development Awards and new Partnership Awards

2 Improved evidence base of what works and why in addressing challenges facing communities and individual

- Collect and use data to build our knowledge and understanding of the challenges facing individuals and communities
- Identify and test innovative approaches which address complex issues and which help us gain evidence about "what works, what doesn't work and why"

3 Increased awareness and use of evidence to inform policy and practice

- Build our understanding of the policy and practice context in areas of identified interest;
- Build effective partnerships and share our knowledge and evidence to support development of policy and practice both internally and externally
- Improve our understanding of the impact and effectiveness of our own grant making and other resources on individuals and communities

4 Improved capacity of third sector organisations to deliver impact to their beneficiaries

- Use support, knowledge and evidence to build capacity and skills in third sector organisations

We will work with all four Teams within the organisation to embed a learning approach and to ensure that we are focussed on building understanding of how our resources are being used with the aim of informing our future practice and investments.

Appendix 1 details the organisational level outcomes and indicators and shows the activities that the Innovation and Learning Team will deliver to meet these outcomes in the first 12 months of the strategy.

What we will do

The Team is responsible for driving an Innovation and Learning approach across the Trust which in turn enables us to improve our own internal learning to increase the impact of our awards and also to influence external policy and practice.

We will do this in two main ways. Firstly, we will do this through our direct delivery with and support to third sector organisations. This is primarily done through making and managing Partnership Awards which encourage innovative approaches to address recognised issues. We recognise that in order to encourage innovation some initiatives will not work as planned and in these situations we will seek to maximise the learning.

Secondly, we will provide support across all the Trust teams to adopt an approach which enables us to maximise the impact of our work through using data, drawing on the learning and then communicate this effectively both internally and to external stakeholders to influence future policy and practice. Our main areas of activity are:

1 Direct delivery and support to third sector organisations

We research, co-produce, fund, manage, monitor and evaluate programmes of work (Portfolios) in areas of interest to us through our Innovation and Learning Themes.

a. Maximising the learning from our existing Development Award Portfolios

These are the Portfolios we have been working with where learning has already been shared and there is evidence that policy and practice have been influenced. The Trust does not plan to make any further significant investments in these Portfolios but the current projects within them will be project managed to their end dates and relevant additional learning will continue to be shared. Learning will be shared internally with the Giving Team to influence our Open Grants Programme. An occasional additional Award may be made if it builds on learning and evidence we have already shared and enables this to be embedded within mainstream provision.

These portfolios are Criminal Justice, Sport for Change and Alcohol Misuse.

Full details of these portfolio areas are included in Appendix 2

b. Research, Development and Delivery of new Partnership Award Portfolios

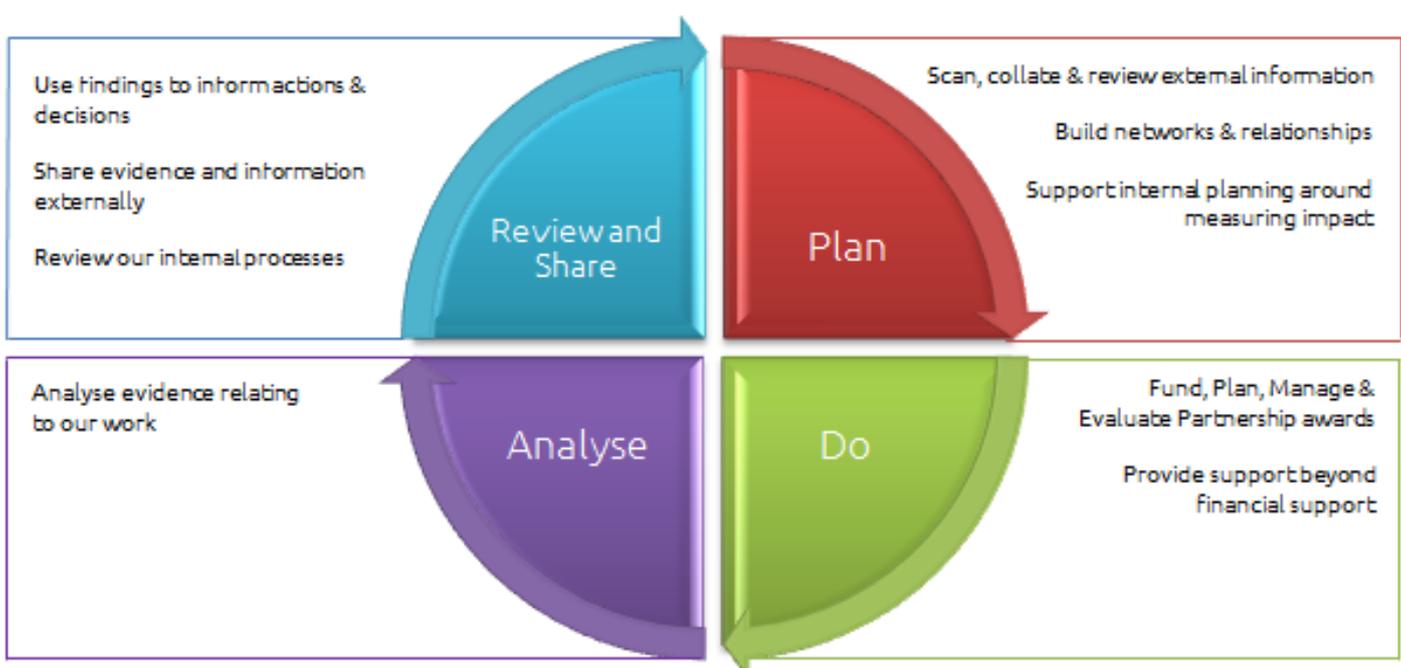
As part of this new Strategy the Trust has, at present, identified three Portfolios of work which the Team are currently investigating and/or are actively engaged in delivering Partnership Award within. Partnership Awards are designed to test new ways of working and to build evidence around “what works, what doesn’t work, and why” within our specified Innovation and Learning Themes. All programmes / projects need to have the potential for scale-up or at the very least for the learning to be mainstreamed across a community, Local Authority or Scotland as a whole.

These portfolios are: Improving the well-being of Vulnerable Women, Preventing Young People from entering the Criminal Justice system and Enabling Change and Sustainability.

- a. Research and Knowledge:** We carry out research and provide internal briefings on areas which are of particular relevance in Scotland today and have the potential for learning and impact. This is to enable us to understand better the environment in which we are working, and to identify new areas where we might best utilise our resources to have an impact.
- b. Partnerships:** We will bring people together to enable us to drive change. This will include other funders (other Trusts and Foundations, public sector and private sector) and also key stakeholders locally and nationally to help inform our work, support its delivery and share the learning.
- c. Innovation:** We will actively seek to push the boundaries and drive new approaches to seek solutions to identified needs and issues including the development of new partnerships and new funding models to achieve spread and sustainability of approaches which work. We recognise the need to take risks to achieve results and recognise the possibility that not all innovations will succeed.
- d. Evaluation and Learning:** Reflecting our desire to become an impact focussed funder and to better understand the value of our investments, we will work across the organisation to implement new systems to improve the way we gather, analyse and report on our over-arching outcomes. We will help each team develop an Impact and Learning plan to measure and understand the impact of their work in line with both organisational level and team outcomes.
- e. Communication:** We recognise the need to communicate effectively about our work both within the organisation and with key stakeholders externally. We will work across the organisation to support all teams to develop a communications plan for their work that supports clear dissemination of relevant information both inside and outside of the organisation with the aim of supporting delivery of key outcomes.

How will we do this?

Table 2 shows the cycle that we embed across all of our practice and how the different elements of the Innovation and Learning Team's work fit into this. This cycle aims to ensure that we are continually building our knowledge and drawing out and using the key learning from internal and external evidence. While how we work will vary from project to project, and across teams within the organisation, these are the key approaches we will use for delivering our Innovation and Learning outcomes.



PLAN

Scan, collate and review information from external sources

We will stay informed of policy developments in areas which are of particular relevance in Scotland today and have the potential for learning and impact. We will gather information and evidence from the external and internal environments and identify who else is working in similar areas and what types of information they are gathering

This will help us to strengthen our own evidence, build relationships with relevant partners and stakeholders, and see where there are current gaps in evidence to which we might be able to contribute. This will help to inform when it is appropriate for us to support an intervention and to help decide what kind of intervention(s) is appropriate for us to make.

Before working in a new area we will assess that there is **Capacity** (both for ourselves and those we will be working with), **Appetite** (to try something new and test how well it works) and **Need** (among individuals and communities, and for a new approach). We will also assess whether our intervention is likely to have a positive impact on, or influence, the existing policy and practice environment.

Build networks & relationships

We will use our convening power and networks to foster and promote understanding of common challenges and to develop new ways of funding and partnership working. We will recognise where skills, knowledge and experience already exist in doing so.

Support Internal Planning around Measuring Impact

We will work across all teams to ensure that we are clear on the impact we want to make and that we are able to gather evidence that will tell us if we are progressing towards making this impact. Where useful, we will put in place clear targets for our work and mechanisms for measuring our progress. We will use learning to help shape future interventions.

DO

Fund, Plan & Manage Partnership Awards

We will have a clear focus on developing innovative approaches to address identified problems and then gathering and using evidence to test what works, what doesn't work and why, in order to increase and improve the evidence base.

Partnership awards may take a variety of forms, but will be based on identifying the best delivery model for testing hypotheses or building evidence around what works in a particular area of interest.

Organisations may be invited to apply for a partnership award, or awards may be advertised openly for application, depending on the programme.

Provide support beyond financial support

We will provide meaningful and proportionate 'Funder Plus' support to organisations we fund using both internal and external expertise and resources to build capacity and capability.

We will commission and manage external evaluations, support self-evaluation and/or manage internal evaluations of the projects and programmes as relevant in order to draw out relevant learning.

Through our Open Grants Programme and our Partnership Awards we aim to build the capacity of third sector organisations to generate and learn from their own evidence and others. This will help to strengthen the capacity of the sector and help to build the evidence base.

ANALYSE

Analyse evidence relating to our work

We will draw together and make sense of the information we already have and the evidence we gather through our work to measure and demonstrate our impact more effectively across all of our teams and departments.

REVIEW & SHARE

Use findings to inform actions and decisions

This will support us to make evidence-informed decisions, including where to target our resources to support the best possible outcomes for individuals and communities in Scotland.

Review our internal processes

We will regularly review our own internal work and processes to ensure that we have in place the best systems for ensuring effective delivery of our work and to check that we are making the progress that we had anticipated in any particular area.

Share evidence & information externally

We will communicate key evidence and information about our work with key audiences. Where relevant, we will seek to have evidence adopted at policy and practice levels.

We will work across all teams, and at an organisational level to ensure that we are consistently sharing key information and messages about our work externally.

Monitoring Progress of the Trust's Strategies

As an organisation, we are committed to achieving the greatest possible impact with the resources available to us. This will involve clearly understanding the impact we want to make, and ensuring that we have plans in place to gather data that will let us know if our work is delivering the change we had hoped for. We will also use the data to identify what works and why, and to improve our own processes as required.

As a team we have responsibility for working across the organisation to help each team develop Learning Plans to measure the impact of their work, in line with the Trust's overarching outcomes.

Across each of the teams we have identified a number of priorities which will help us to effectively measure our impact. These include:

- Continue to record and analyse evidence which shows what difference(s) we are making against each of the overarching Trust outcomes
- Develop systems to better understand the difference our funding makes for individuals and communities
- Monitor the quality of our relationships with key stakeholders and to improve them as required
- Develop and implement appropriate systems for gathering external feedback regarding our approach as a funder
- Evaluate the formal and informal support we provide to individuals and organisations

We will use this information to support continuous improvement across the organisation. We will also share our learning about what works and why with key stakeholders in order to influence external policy and practice.