



UK Evaluation Roundtable Learning Away Teaching Case

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Teaching Evaluation Using the Case Method

[From: Patton, M. Q. & Patrizi, P. (2005) *Teaching evaluation using the case method*, San Francisco, CA: Jossey Bass. pp. 5-14.]

“[Traditional] evaluation training...relies mainly on traditional didactic teaching in the classroom to ground students in the scientific approaches that are the cornerstone of the field. But methods are only the beginning of what [students] need to understand in order to succeed. Once students have mastered the basics of evaluation options, designs, and methods, the challenge of professional practice becomes matching actual evaluation design and processes to the nature of the situation, as well as hearing and mediating the opposing opinions that often surface.

In mature professions like law, medicine, and business, case teaching has become fundamental to professional development. Once one has learned the basic knowledge of a field, higher-level applications require judgment, astute situational analysis, critical thinking, and often creativity. Professional practice does not lend itself to rules and formulas. Decisions are seldom routine. Each new client, patient, or customer presents a new challenge. How does one teach professionals to do situational analysis and exercise astute judgment? The answer from these established professions is the case method.”

“Cases take us beyond the reality of the individual and plunge the learner into a plot with multiple perspectives, strong disagreements, and avid articulation of fully plausible yet fully divergent views. Just as in real life, learners hear from others who may have conflicting opinions, but unlike reality, learners can step out of vested interests, remove blinders that can hinder learning, and experiment with new skills and approaches in a secure environment.”

Best teaching case practices include:

- The core decision points throughout the case should have enough tension (and enough factual information and context leading up to them) that you could reasonably argue competing perspectives about the decisions made. In other words, the case should not just be a narrative about what worked or did not work. There must be clear moments where decisions could have gone different ways. Choices have different benefits and costs.
- The author's voice should be neutral, with no "drawing of conclusions." The tension between the choices at the decision points can, for example, be presented through direct quotes of the participants. The case itself does not do any diagnosing or give commentary on the success or failure of a particular decision, or does it frame or summarise the questions for discussion.
- The facilitator should be able to ask questions like: "What is the main tension at play here?" "What do you think about the way the group decided to proceed?" "What are the practical implications of the decision for grantees?" "What did they give up by going that route?" "What else could they have done and at what cost/to what benefit?"

Background on the Case

This teaching case was written for evaluators and funders. The case focuses on a real-world evaluation commissioned by an independent foundation that used a *strategic learning* approach to evaluation. Strategic learning means using evaluation to help organisations or groups learn in real-time and adapt their strategies to the changing circumstances around them. It means integrating evaluation and evaluative thinking into strategic decision making and bringing timely data to the table for reflection and use. It means making evaluation a part of the intervention – embedding it so that it influences the process.

Evaluation focused on strategic learning is different from more traditional evaluation approaches in some important ways. For example, it is fundamentally different from *summative* evaluation, which judges the overall merit or worth of an effort for the purpose of concluding whether that effort should be continued or discontinued.¹ As Michael Patton says, summative evaluation is not even possible with emergent strategies because they will not “hold still long enough for summative review.”² Strategic learning is also different from *formative* evaluation, which focuses on improving a program or effort, often so that a later summative evaluation can be done. While strategic learning certainly aims to help strategies improve or move in a positive direction, in reality the “right” direction is not always known. Strategic learning means helping strategies adapt based on what information is known or can be collected at the time. It does not necessarily mean making judgments that what was done before was ineffective. Finally, strategic learning is different from evaluation focused on *accountability*, which aims to ensure that efforts are doing what they said they would do and that resources are being managed well. Strategic learning has a much broader purpose that goes well beyond oversight and compliance.

This case focuses on the *evaluation* of Learning Away, an ambitious educational programme funded by Paul Hamlyn Foundation. It is intended to promote a critical analysis of the evaluation and its evolving interaction with the grantmaking program and strategy, rather than an analysis of the grantmaking strategy itself.

¹ Scriven, M. (1991) *Evaluation thesaurus. 4th edition*, Newbury Park, CA: Sage.

² Patton, M.Q. (2008) *Utilization-focused evaluation*, Thousand Oaks, CA: Sage, p.118.

Introduction

This teaching case tells the story of how external evaluators and staff and advisers at the Paul Hamlyn Foundation tackled the challenge of evaluating a complex, diverse, and ambitious educational programme.

In the midst of an educational climate that meant that few schools felt they had much scope to innovate or be particularly creative with their curriculum, the Foundation had embarked on an effort that sought to give schools at primary and secondary levels the opportunity to experiment with innovative approaches to residential learning, i.e. learning outside the classroom that involves at least an overnight stay.

At the time, the Foundation was just beginning to fund large, special initiatives that staff and trustees hoped could make a lasting difference in the areas it was most concerned with. Staff at the Paul Hamlyn Foundation had limited experience with tendering for evaluations, but they also knew that a credible evaluation was crucial in influencing both central government and head teachers of the utility of residential learning. Foundation staff believed that an evaluation could provide a key role in planning and shaping their residential learning initiative as well.

In the course of the initiative, the Foundation contracted with two different sets of evaluators. Both organisations are highly respected with long experience in carrying out rigorous evaluation and research projects. Both faced challenges in trying to meet the needs of the Foundation and the schools, with which they were working closely. The Foundation staff and advisers similarly wrestled with how best to construct an evaluation that would meet their hopes of delivering the evidence they believed was crucial on this bold educational initiative.

The beginning

In 2006, staff and trustees at the Paul Hamlyn Foundation were looking to take a radical new direction in their grantmaking. Established in 1987 by Paul Hamlyn, a publisher and philanthropist, up until the mid-2000s the Foundation had taken a fairly conventional route to grantmaking. Most of its funding was in the form of relatively small grants through an open process of applications in the Foundation's areas of interest - primarily education and the arts. When Paul Hamlyn died in 2001, he left the bulk of his estate to the Foundation and the grantmaker's assets increased from £100 million to £550 million by 2007. The Foundation was in a position to make much larger grants.

'The thinking was how can we achieve greater impact with our money?' noted Peter Wilson-Smith, trustee at the Paul Hamlyn Foundation: 'We were looking to be more strategic. If you are a grantmaking organisation you can give away money to lots of different organisations or you can focus in limited areas and develop more expertise and knowledge and ultimately have more impact'.

The Foundation created a six-year strategic plan, running from 2006-2012, which committed the funder to develop special initiatives in a few select areas in which it would invest significant sums in hope of making such an impact. These initiatives would be across the Foundation's areas of interest in the UK, which were in arts, education, and social justice. The Foundation would also continue its practice of making open grants.

Residential Learning Initiative Germinates

At the time, Sir Tim Brighouse was an adviser to the Foundation's Education and Learning Programme Committee. A well-known figure in the education world, Brighouse had been in charge of education in Birmingham and was former London Schools Commissioner. In his roles, Brighouse had promoted the notion that residential learning experiences - where students spend at least an overnight away from school on some type of educational activity - were a powerful means of enhancing learning and the educational experience for students and staff. He worried that these valuable learning opportunities were declining because of budget cuts and other forces.

'I was the person who suggested it soon after becoming an adviser to the Paul Hamlyn Foundation', Brighouse said: 'I wasn't thinking of residential education the way it's typically thought about here - as an opportunity to do outdoor pursuits. That is part of it. But you can have it for geography, music, debate, the environment. You can have it for loads and loads of subjects'.

'Some of the people at the Foundation had the experience of residential learning, or their children had', Brighouse added: 'I touched a responsive chord'.

Denise Barrows, who joined the Foundation in May 2007 as the Head of Education and Learning and who had years of experience running or overseeing residential, was asked to do some research into a potential initiative around residential learning.

Barrows said: 'We had a list of ideas for possible initiatives. I was asked to work up Tim's residential suggestion and put forward a proposal. At the time, because it was a suggestion from an adviser [Tim Brighouse], it was 'let's do it''.

At the time, the government department for education (England) was spearheading a national movement called Learning Outside the Classroom. The department worked with a wide range of educators, officials, and consultants to develop a national manifesto to encourage schools to commit to providing more activities outside the classroom. Those activities could encompass everything from using the school grounds much more effectively, to trips to heritage sites and religious venues, to doing language exchanges and providing residential experiences.

'Learning Outside the Classroom was trying to make the case that many young people learn differently and are more engaged in their learning if they are taken out of a formal classroom and given real life experiences', said Peter Carne who worked within the Department for Education on the manifesto for two years: 'The real life learning can have a bigger impact on them because it's authentic learning. There was this major concern that those kinds of experiences for young people were on the decline because of the introduction of a more prescribed national curriculum, a lack of understanding of its value, and health and safety concerns'.

The Paul Hamlyn Foundation staff shared their ideas for a residential learning programme with Carne and Mike Tones (who worked alongside Carne on the manifesto), who believed that the Foundation could fill a gap in the field by providing more evidence about the impact of overnight learning, as opposed to learning simply outside the classroom. Carne and Tones shortly joined the steering group that oversaw the development of the Foundation programme.

As part of the government's efforts, it commissioned a study by Ofsted that conducted an assessment of learning outside the classroom. The assessment made clear that residential learning could be improved, especially at the primary school level. For example, the report stated that too many residential activities were not well connected to the curriculum and that too often teachers weren't closely involved in planning the activities. Sometimes 'residential learning was just seen as a bit of fun in the outdoors', Barrows said.

An Initiative to Give Schools Freedom to Try Innovative Ideas

At the time of the Foundation's interest in residential learning, central government was exerting significant control over decisions around education.

'The English education system was very prescriptive', said Philippa Cordingley, CEO of the Centre for the Use of Research and Evidence in Education (CUREE), the first evaluator of Learning Away: 'This was a time in which the UK government was involved in telling teachers in huge detail how to manage their professional practice and choices'.

Still, head teachers did have control over the *delivery* of education within their schools. So, two levers existed for the Paul Hamlyn Foundation to influence residential education at the time – directly through head teachers and via national bodies such as the Qualifications and Curriculum Authority.

The Initiative: A Six-Year, £2.2 Million Residential Learning Programme

In January 2008, the Paul Hamlyn Foundation made a six-year, £2.2 million commitment to a residential programme called Learning Away. The overarching goal was for schools to significantly enhance young people's learning and achievements by using residential experiences as a key, long-term component of their learning and improvement strategies.

'We were giving grants to schools, or clusters of schools, to run residential programmes to benefit students but we were looking for wider benefits than that - we wanted to influence practice and adoption', said Wilson-Smith, chair of the Learning Away steering group.

Foundation staff and trustees wanted these residential experiences to benefit all students, not just the ones whose parents could afford to pay for them. They sought to take students out of their classroom, put them in a different environment and, in a short period of time, make a great impact on a range of learning outcomes. The hope was that Learning Away would provide enough evidence of its effectiveness on improving students' attainment and other outcomes to influence practice by head teachers so they would adopt residential learning and ensure they were providing quality programmes. Foundation staff and trustees particularly wanted participating schools to take more responsibility for designing and delivering their own residential experiences, fully integrated within the wider curriculum, and for developing new models for how residential learning could be used.

Primary, secondary, and special schools across the UK were eligible to develop 'innovative residential learning experiences', according to the Learning Away information and application guidelines. While it was crucial that any residential be clearly linked to a school's curriculum, the call for proposals gave schools wide latitude in coming up with those innovative learning experiences, latitude that would have implications for the evaluation later on.

Ronnie Bleach, a pupil support manager at Calderglen High School in East Kilbride, said that the school had done residential for years, particularly in helping students from two secondary schools that were being combined come together and get to know one another. In the past, the school typically brought together just 30 of the 300 students, in part because of the costs. Parents had to help pay for the residential and not every family was in the position to do so. One of the appeals of Learning Away, Bleach said, was the ability to make the residential available to all students, not just those whose families could afford it.

‘Another thing we liked about Learning Away was that it was trying to bring it into actual school life, rather than just bolting residential on, which is what usually happens’, Bleach said: ‘It was trying to develop the residential into the school curriculum’.

Freedom to Try Innovative Approaches

Learning Away was a clear attempt to move away from the UK’s prescriptive system of education, Cordingley said:

‘The Paul Hamlyn Foundation was trying to say, ‘what happens when you emancipate professionals?’” Cordingley noted: ‘They went radically down the road of not prescribing what schools should do’.

Proposals were to be developed and submitted by groups of schools that would commit to work together on residential learning. In the end, the Foundation funded 13 clusters of more than 60 primary, secondary, and special schools starting in September 2009. The purpose of the clusters was to facilitate collaborative learning. The Foundation hoped that schools in each cluster might work together, share knowledge, and hold each other to account, Barrows said. In addition to a main ‘implementation’ grant, each cluster received a separate ‘support’ grant to participate in evaluation, knowledge management, and collaborative learning activities.

Plans for an Evaluation of Learning Away

While evaluation was still a relatively new function at the Foundation, it had a policy to commission external evaluations of all special initiatives, including Learning Away. One of the more critical aims of Learning Away, several of those interviewed emphasised, was to collect evidence that would enable the Foundation to make the case, both to central government and to head teachers, for more, and better use, of residential for students.

‘Lots of individuals and provider organisations believed that these experiences were a good thing’, Carne said: ‘But we didn’t really have good, hard research evidence of the benefits of high quality residential learning. That was the big gap. There were lots and lots of organisations providing these experiences and making the case that they were of value, but there was not enough evidence to convince head teachers that they should provide these experiences and more of them for all of their pupils’.

The Foundation had limited experience in commissioning evaluations. It had no director of evaluation so it fell to Barrows and her colleagues to put together a request for tenders to evaluate Learning Away.

Theory of Change Idea Gets Floated and Rejected

At the time, the Paul Hamlyn Foundation had another initiative underway called Learning Futures, which had a focus on developing innovative teaching and learning approaches to foster deeper levels of learner engagement. Prior to developing the tender for the Learning Away evaluation, Barrows began working on an evaluation strategy for Learning Futures. In this she emphasised the value of using a theory of change approach to underpin the evaluation work.

However, when tendering for the Learning Futures evaluation work, her colleagues on the Learning Futures project team were not convinced that such an approach made sense, fearing it would be too limiting for potential evaluators. Not all evaluators might wish to base their work on a theory of change approach, Barrows said. As a result, Barrows removed the theory of change language from the Learning Futures evaluation tender. Given that feedback, Barrows then did not include it in the Learning Away evaluation tender.

The evaluation brief for Learning Away stated the scope of the proposed evaluation would cover three areas:

- Rendering judgements - determining the overall merit, worth or value of the Learning Away programme.
- Facilitating improvements - improving and enhancing the programme to maximise impact.
- Generating knowledge - drawing conclusions and recommendations about the effective use of residential learning experiences and contributing to a wider body of knowledge about how best to support children and young people's learning outcomes.

The evaluation brief further stated: 'Although the fundamental evaluation question is 'did the Learning Away interventions lead to the desired outcomes for participating young people' we recognise that it is very difficult to reach definitive conclusions about causality, especially in multi-layered, multi-site initiatives. Therefore our aim is more modest: to gather reasonable estimations of the likelihood that Learning Away interventions have contributed in concrete ways to the observed effects'.

In addition, the brief stated that whilst the appointed evaluation partner would oversee the evaluation work and independently analyse the findings, the Foundation anticipated that they would make use of the existing Learning Away team to help with data collection and incorporate school-level self-evaluation activities to help maximise the available resources and strengthen the overall evaluation.

The evaluation contract would initially be offered for the first three years of the implementation period of the initiative (2009-2012) with the likelihood of extension for a further additional two years subject to the review of the first three years' progress.

'It was crucial that we build some evidence of impact to show that high quality residential experiences can achieve really significant outcomes across a range of areas, from being able to significantly impact on attainment to much broader social skills', Barrows said: 'The other thing that I felt strongly about was that we understand *why* it is that residential have that impact?'

Evaluation Phase 1: Evaluation Commissioned

Shortly after Barrows wrote the evaluation tender, in August 2009, she went on maternity leave. In autumn 2009, the Paul Hamlyn Foundation sent out the evaluation brief. CUREE was one of the organisations that responded. CUREE is a well-known evaluation centre in the UK with particular expertise in education.

‘We thought really hard about whether we would go for it, given the constraints’, said Philippa Cordingley, CEO of CUREE: ‘And once we had been recruited and understood the permissive nature of the programme, we knew, given the very wide range of projects, schools, regional variations, and student numbers that this was going to be a hard nut to crack, particularly within the short term of the first phase. By going in with a research review we thought it would be possible to nail what was likely to have most impact and use the evidence about types of impact and types of residential processes, plus the collective programme profile, to generate formative and summative tools for the self-evaluation’.

Natalia Buckler, Principal Research Manager at CUREE, also remembers believing that it would be challenging within the Foundation’s general budget parameters to design an evaluation that would achieve all of their goals: ‘When we encounter projects like this, we always outline exactly what we can and would do in our proposal. We then leave room for project initiation meetings where we discuss the overall evaluation approach and support the client in prioritising key evaluation objectives. We did not have this opportunity in the case of Learning Away’.

While the Foundation did not specify a budget in its tender, staff probably gave interested organisations a general range they were considering, Barrows said. In the end, the budget for the winning bid was £86,755 over three years.

Within the budget constraints, CUREE staff felt they could create an evaluation that would provide the qualitative impact data that the Foundation wanted. To do so, CUREE proposed an evaluation that would in large part support schools to collect data that CUREE would in turn analyse and synthesise as the specification requested, Cordingley noted.

CUREE staff said that the Foundation was asking a lot out of its evaluation: to be both formative and summative. They believed, however, that, despite being difficult, it was doable: they could provide a formative evaluation that would provide the information that the Foundation was seeking.

‘The Foundation put out a specification that wanted everything’, Cordingley said: ‘We made a presentation and we said explicitly you can’t do that. You can’t get hard outcome data if the schools aren’t focused on hard quantitative outcomes. It’s not possible. There is too much diversity in what the schools are doing. We thought we could do the formative job really well, increase the collection of good quality data, and do a meta-analysis of the qualitative data, which would lead to a credible account of impact particularly in later phases. We were very, very explicit about what we couldn’t do and could do’.

The Paul Hamlyn Foundation team, meanwhile, also wanted a lot from the evaluation given the budget, hence the expectation set out in the brief that the evaluators would make use of data already being captured as part of the monitoring and ongoing review processes, and utilise capacity within the schools and the core Learning Away team to support the wider evaluation process.

Tim Brighouse, who was part of the selection panel, remembers feeling some misgivings after hearing CUREE's presentation:

'Though I was persuaded they gave the best presentation and thought they were more impressive than the others, where I had my doubts - which I kept to myself - was would they be sufficiently, sharply evaluative?'

Nevertheless, the panel charged with selecting an evaluator believed that CUREE was the strongest candidate. In December 2009, CUREE was given a three-year contract to carry out an evaluation of Learning Away.

CUREE Takes the First Steps

One of the first steps that CUREE took was to conduct a literature review. CUREE evaluators wanted to make sure that they designed their evaluation instruments in accordance with existing evidence about features of learning that could be captured during a residential and the presence of/progress in those features, which indicates a high likelihood of measurable educational impact at a later stage, Buckler said. What soon became apparent to CUREE, however, was that it would be difficult to use common data collection tools available for evaluation.

Among the challenges: students and teachers were 'in the field' during residential, which made it hard to survey them, Buckler noted. It is also difficult to design such surveys for young children (a significant proportion of the programme beneficiaries) who do not yet read much. In addition, CUREE staff read the schools' proposals and found that the schools had a huge diversity of activities they were proposing, making it difficult to find common areas to evaluate. The schools worked on everything from GCSE attainment to community cohesion, from family support and raising aspirations to cultural diversity.

Buckler remembered one of the initial meetings she held with her staff in early 2010 to try and sort out how to move forward:

'It was probably one of the hardest meetings we had ever had', Buckler recalled: 'We were drawing on years of collective experience in designing this evaluation because the diversity in the programme made coherent evaluation very challenging'.

From CUREE's point of view, the diversity of contexts, foci, and interventions meant that they had a huge number of small-scale interventions to evaluate. CUREE evaluators had anticipated large samples of children experiencing similar interventions aimed at similar outcomes, Buckler said. Once it became clear that was not the case, CUREE set about ensuring that the data collected were more coherent, according to Buckler.

Given that diversity, and based on the literature review it conducted, the CUREE team decided to create what became the self-evaluation toolkit (SET), a set of four tools to capture evidence about the few aspects of quality residential learning that were consistent across all or most clusters (such as focusing on developing peer and pupil-staff relationships and group work). CUREE developed a set of research-based benchmarks for each of the tools, to be able to measure and 'quantify' pupil progress and development as well as capture in-depth qualitative evidence illustrating progress indicators. Over the project, CUREE hoped to use these tools to record the clusters' progress and turn that information into a

helpful set of principles and guidance for others interested in evaluating residential learning experiences in the future.

In addition to use of the SET, there were two other strands to the data collection strategy that CUREE proposed: extracting evidence from schools' own evaluation activities and, secondly, undertaking their own school visits and documentary analysis. CUREE described how the schools' own plans to evaluate the success of their programmes would 'form an important bedrock to the evaluation', according to a handout that CUREE produced for schools following the April 2010 workshop. Through school visits in the first year, CUREE aimed to help build a collaborative culture for the evaluation work across the programme.

CUREE intended that data from all three strands of activity would be analysed to draw conclusions for reporting purposes. Case studies would also be written for each cluster.

The Self-Evaluation Tool Kit

The self-evaluation toolkit (SET) consisted of four tools to help Learning Away clusters to evaluate their practice in the areas that are strongly linked by research and evidence to positive outcomes for children and young people, according to a document describing the SET. Each tool is an age-appropriate, interactive, and often visual indicator that students and teachers would use to show their progress in those areas. Those areas and tools are:

1. Well-being and relationships to learning – Blob Tree tool, which is described in detail below. It is intended to stimulate the exploration of children and young people's thoughts and feelings about the learning relationships they encounter – both at school and when learning away – which support or hinder their learning.
2. Context-based learning – Diamond 9 tool. With this tool, children take up to 12 photos of their learning environment and prioritise the top 9 to establish what or who supported their learning best. The purpose of this tool is to provide teachers with insights into how their pupils see their learning, what aspects of their learning context they think makes it effective and what aspects of the learning away context were particularly helpful for achieving the goals of the residential.
3. Dialogue and group work – Tasters tool. Staff observe and record pupils' interactions with peers and with a teacher. As a data collection tool, tasters use various methods (such as structured observation or video recording) to gather evidence that is useful for evaluation purposes.
4. Linking Learning Away with learning at school – Bull's eye tool. In this tool, teachers work together to reflect on the underpinning processes that support pupils' learning. They use a recording sheet to prompt their reflection as well the information gathered from the other tools to explore the key elements of planning for effective learning, approaching Learning Away as a planned learning experience, and making links with learning at school.

As a more detailed example of the tools, the Blob Tree, which was developed by consultant Pip Wilson, is designed to help students think and talk about their feelings about their learning relationships – both helpful and unhelpful – in a specific context at school and, in this case, at Learning Away residential.

Children get a picture of a tree that has about 20 figures of human-like 'blobs' with differing expressions and relationships to one another on different parts of the tree. The children are asked to think about a specific learning activity and the relationships they had with other people during the activity. They then find blob people that are most like these important relationships and colour them in. Students are also asked to find one blob person that represents an unhelpful relationship and colour that in as well.

Following pupil selections of images representative of their learning relationships, staff interview a sample of children about their choices, and record the children's responses as well as their own reflections and observations. Finally, teachers are asked to reflect on all the evidence they collected using a particular tool and select a benchmark, indicating the level of practice development.

Craig Hayes, the Head Teacher at Goonhavern Primary School, said that he found the Blob Tree helpful in gauging students' feelings before and after the residential. Hayes, whose school is in Cornwall, had 30 of his students spend a week interacting with students at a school in the city of Birmingham for his school's Learning Away residential. Goonhavern is located in a rural, isolated, and largely white community. Hayes wanted his students to learn about the diversity of a large city, including the students who attended Cornwall's partner school, Twickenham Primary School, who include Afro-Caribbean, Somalian, Indian, Pakistani students and others.

'At the beginning of a residential, if a child identified a theme on the Blob Tree that showed he was a little bit worried or concerned, we would keep an eye on him and look for ways to improve his confidence and self-esteem with others', Hayes said.

He said that the Blob Tree, which students also filled out at the end of the residential, was a helpful way to show changes in the children's well-being and relationship to learning:

'We would see a change when they came back', Hayes said: 'You would find that when they returned they would colour a character closer to the top of the tree that showed more confidence'.

In addition to providing CUREE with the data requested, clusters also reported annually to the Foundation on each of their Learning Away programmes and outcomes using a standard reporting framework that included areas such as:

- A description of the programme and its aims
- Numbers and brief descriptions of the participating students, staff, and schools
- Outcomes for students, staff, and impact at the school level
- Processes of planning and delivering Learning Away experiences
- Outlines of the cluster's evaluation and evidence collection methods
- Summary of key learning points, implications for further development and planned next steps.

Both CUREE and Foundation staff used these reports from the clusters to inform their understanding of the process and outcomes of the Learning Away programme.

In addition, throughout the Learning Away initiative, Foundation staff had other sources of data to inform their understanding of the programme.

'The formal evaluation, as carried out by the evaluator, was one source of data and understanding but not the only one', said Jane Steele, Head of Impact and Evaluation at the Foundation: 'The Paul Hamlyn

Foundation received regular reports from schools on their progress and from our team in the field. The advisers in the field were very active in coaching and challenging schools and bringing their reflections on what they found to Foundation team meetings’.

As well as using these tools and data sources from CUREE to inform their work, schools received support from Learning Away advisers in developing their practice - they visited regularly and provided advice and feedback. All schools also met together to share their learning at day long workshops at least once a year and the Foundation developed a website and newsletter to share practices and information.

The workshops enabled Foundation staff to provide information and input designed to foster the development of strong practices, to learn from participants, and to facilitate sharing between the clusters. All of these efforts were aimed at supporting collaborative learning and fed into the data that Foundation staff used to inform their understanding of Learning Away.

Early Concerns about the Evaluation

In the early spring of 2010, CUREE piloted the SET tools with four of the 13 clusters. In April 2010, CUREE presented an overview of the evaluation approach, including the SET methodology, to all of the participating schools. For Denise Barrows, who had just returned from maternity leave, it was her first chance to get to know more about the evaluation:

‘I immediately had concerns about what CUREE was proposing’, Barrows recalled: ‘I came away from the workshop with the feeling that the plans were primarily geared to facilitating practitioner enquiry and practice development, rather than generating the evidence of impact that we needed’.

Barrows remembers being concerned that the evaluators were relying on ‘proxy indicators’, such as group work and dialogue, for evidence of impact. For their part, CUREE were aware that few of the projects were actually focused on attainment and, from their literature review, they knew there was evidence that effective group work and dialogue in the classroom leads to better attainment and such interactions can happen well in residential settings. But Barrows worried that such an approach was too indirect, rather than seeking to measure if the residential had an impact on attainment, which was key to making the case to schools.

‘These processes [group work and dialogue] might work in residential settings but they could also be used in non-residential settings’, Barrows said: ‘I didn’t feel it was going to give us direct evidence of impact’.

In addition, she was concerned that the proposed data samples from the SET would be very small and that the schools had been given no guidance on their own evaluation activities, despite this being key to the overall strategy.

Buckler, meanwhile, felt that the evaluation team’s initial work and presentation with the schools went well and provided helpful feedback. She said her impressions that the schools had received the evaluation well came from feedback from evaluation forms as well as speaking to many people during and after the event.

‘We wanted to co-construct the SET with the schools’, she added: ‘We wanted to put the ideas in front of them and ask them what they think’.

Shortly after the April workshop, Barrows set out her concerns in writing to CUREE and held a meeting with Buckler and Cordingley to outline her apprehensions about the evaluation.

'I explained that I needed to understand their approach, I don't get it, and these were my concerns', Barrows said: 'CUREE defended their plan very robustly, insisting that the methodology would give us the evidence we needed and said they were just trialling it at that stage. Although I had real concerns, it also felt premature to assume that the methodology would not be appropriate, given their expertise. At that stage it seemed appropriate to give them the benefit of the doubt'.

Buckler remembers spending much of that meeting discussing the programme, challenges clusters were facing in their work, the evaluation approach as well as trying to explain the purpose and nature of the SET tools to Barrows.

'At that stage I don't think we appreciated that Denise had concerns about the overall approach', Buckler said: 'We thought her concerns were about the tools'.

For their part, the CUREE team said that the worries expressed by Barrows were frustrating, especially since the agreed approach to the evaluation had been underway for several months at this point.

'Denise was probably surprised by how far things had moved since she went on maternity leave', Cordingley said: 'By the time she returned and engaged with the project again, we were three-quarters into the first year. We had built up a head of steam with the schools'.

CUREE Produces First Report

CUREE continued on its plan to use the SET as a key method of gathering data from the schools. In response to the questions by the schools in the April 2010 meeting, the evaluators produced detailed guidance on how to use the SET. CUREE also produced its first report, based on the pilot project with about half of the schools, and case studies from visits to ten of the clusters, in autumn 2010.

The report described the characteristics of the Learning Away partnerships and what they were trying to achieve, the participants in year 1, planning activities, interventions piloted, outcomes and results from piloting the self-evaluation toolkit.

Among the conclusions of the year 1 report:

- Many clusters had made significant progress. Evaluations identified behavioural changes in students, most notably in their self-confidence, independence, and the development of relationships. The evaluation noted that the link between these changes and improved learning outcomes is well-evidenced by research.
- Evidence of improvements in achievement in curriculum related areas was limited to a few clusters from secondary schools. It was suggested that clusters from primary schools may need to look more closely at developing links between the Learning Away programme and school-based curriculum activities.
- In year 1, clusters did not identify significant areas of impact of Learning Away at a 'whole school' (as distinct from classroom) level.

Tim Brighouse, who spearheaded the idea of residential, recalled that his earlier concerns about the evaluation deepened at a steering group meeting in which CUREE staff presented their year 1 report:

'I remember when CUREE were presenting [their approach] seemed to be very formative', Brighouse said: 'That was where I began to get slightly worried that the formative was going to dominate rather than the hard data. But they were just getting started. I thought it best to keep my ideas to myself. I've been proved wrong so often in my life. This might be the same'.

Buckler's recollection of the meeting is that several members of the steering group explicitly said they liked their report, describing it as very helpful and informative. This was consistent with the correspondence CUREE received from Barrows, describing the report as 'thorough' and 'comprehensive'.

CUREE submitted its report in the midst of a major government change in England. In May 2010, the Labour party had been defeated in a general election and a new coalition government was formed, led by David Cameron. While the previous government had led a national push to promote learning outside the classroom, the new government took a more hands-off approach to such initiatives. Although not hostile to residential learning, the new government was unlikely to endorse an initiative such as Learning Away. It soon became clear that the best chance for securing buy-in for residential learning was through convincing head teachers, Barrows said.

Developing a Theory of Change

Having decided not to specify a theory of change as the required approach to the evaluation at the outset of the programme, Barrows began some early stage thinking with Learning Away's project team and steering group in December 2010 about developing a theory of change for the initiative.

'It felt important to have a theory of change', Barrows said: 'We wanted to know what was significant about residential learning experiences where you stay overnight. There isn't research on that. We were at a point where we were building our knowledge and distilling learning from what we were seeing. It was just a brainstorm initially with the project team and the steering group. At that stage, we didn't know what we were going to do with it. We were developing our understanding and sharing our personal theories of change to start to explore what was special and unique about residential learning'.

The project team shared its initial thinking with CUREE at a meeting that December and agreed on some key questions to inform the evaluator's year 2 report.

The Foundation Makes Some Key Additions to the Team

In the spring of 2011, the Paul Hamlyn Foundation made some key additions to its team. Peter Carne, who had served on the Learning Away steering group and had previously worked on the Learning Outside the Classroom Manifesto, was appointed to the position of project leader for Learning Away - a two day a week consultancy. Previously, Barrows had overseen Learning Away but she was stretched thin because she was managing several other programmes as well.

Carne, a former geography teacher, had deep experience in learning outside the classroom, working in that field since he stopped classroom teaching after 15 years in 1990. At almost the same time that Carne was brought in to oversee Learning Away, the Foundation appointed its first ever evaluation specialist, which was in part a response to a midterm review of Foundation strategy.

Jane Steele, who was hired to the position of Head of Impact and Evaluation at the Paul Hamlyn Foundation, had previously been the Head of Research for the General Teaching Council for England.

‘Until I came in, nobody had taken the lead as a specialist in evaluation and research’, Steele said: ‘The Foundation wanted to get better at understanding the overall impact it was having, using evidence and evaluation’.

Steele spent her first months getting to know the work of the Foundation and was not initially directly involved in the Learning Away evaluation. Carne said that his first and most important task: ‘was to work with the foundation team and steering group to change the direction of the evaluation process’.

Shortly after starting in the post, Carne met with the CUREE team to review their work and the evaluation progress. As a member of the steering group Carne had an understanding of the evaluation approach. By the time he was appointed as Project Leader, Carne was concerned that it was not going to give the Foundation the evidence of impact and value it needed to make a strong case for change:

‘My review helped me realise that the current approach wasn’t going to work’, Carne continued: ‘The self-evaluation tools, although they were quite useful tools, would not actually provide the hard evidence of impact that was likely to influence school leaders. They were helpful in evaluating the successes or not of individual school programmes, not the initiative as a whole. I was also not sure that they would tell us enough about why residential learning is potentially such a powerful way of learning’.

Buckler, however, countered, that there wasn’t an initiative as a whole *to* evaluate.

‘We thought it was a comprehensive programme when we started’, Buckler said: ‘We found out that it was a selection of projects that had little in common. This was also why our first evaluation report tried to give some guidance for next steps which would work across all the projects’.

CUREE staff also felt that, apart from Barrows, they were getting positive feedback on their work from the schools, steering group and Carne.

‘Peter was extremely positive’, Buckler said: ‘He did want to understand how we were going to approach year 2 of the evaluation. Peter never shared his concerns with us. It wasn’t as if he was questioning anything. The advisers at the Paul Hamlyn Foundation always said that our work was very helpful’.

Struggling to Get Schools to Provide Data

In the summer of 2011 CUREE staff were frantically trying to get data from all participating schools for the year 2 report to the Learning Away steering group in September.

According to Cordingley, the schools were supposed to provide CUREE with data from the self-evaluation tools in May but many did not send it to CUREE until July or August. While CUREE staff felt uncomfortable in trying to analyse data in such a short period of time, Cordingley said that they were under pressure from the Foundation to produce a report for the September meeting.

‘My colleagues wanted to analyse the data for the September meeting’, Cordingley said: ‘They were working until midnight for days to get this done. We weren’t firm enough. We should have said that if

the data is coming in August we can't have an analysis done for the meeting in September. That was wrong of us. As a result of the time pressure, it wasn't our best piece of work'.

CUREE collected reports from the schools on their progress and outcomes as well as evidence about their Learning Away work via the self-evaluation tools. For the Blob Tree SET, more than 120 children had been interviewed by practitioners from 16 schools. Six clusters completed the Tasters SET involving 70 students. Staff captured additional data using other SETs as well. In addition, CUREE staff visited five Learning Away clusters and conducted interviews with 30 staff members, 19 students, and six parents.

Many schools, however, said that they found the evaluation methods challenging to work with, according to Barrows.

A Turning Point

In September 2011, Buckler and a colleague presented the year 2 report to the Learning Away steering group and staff. As far as Buckler was concerned, it was simply another step in the process of the ongoing evaluation.

'We were asked loads of questions', Buckler said: 'That was the first time we heard concerns from people other than Denise. At that point, I realised that there was a misunderstanding about what 'convincing' means. We and the Foundation had very different ideas about what is convincing. It only became apparent to me in the meeting'.

As an example, Buckler said that a member of the steering group asked why CUREE didn't survey everyone at the end of the year to get some quantitative evidence. Buckler told the group that the research evidence suggests that such perception data can be very unreliable: 'Strong practitioners underestimate what they have achieved because they can see what should still be done. Weak practitioners overestimate what they have achieved'.

CUREE, Buckler said, was trying to use micro observations of learning to track pupil progress in detail and turn those observations into quantitative data.

'It was important that we had credible and strong evidence that was convincing to outside groups', Barrows said: 'By that stage the project team had concluded that we were not likely to get what we needed, so we planned to discuss this with the steering group in the light of CUREE's report. We brought to the meeting a proposal for a change of approach'.

Tim Brighouse, who was on the steering group, recalls:

'We had a long discussion and came to the view that we weren't going to get the sort of evidence, if it existed, that we were looking for. It was far too focused on the SET. All of us were concerned that if we didn't do something, we would have no strong evidence one way or another'.

Wilson-Smith, Chair of the steering group, added that there was a particular concern that the evaluation wasn't gathering data in areas that school leaders are likely to be most persuaded by, particularly on attainment.

As a consequence, CUREE were informed soon after the steering group meeting that a decision had been made to change the evaluation approach.

While unhappy with the way the Foundation handled the decision, Buckler reflected that 'it would have been helpful to just invite us to have an open conversation and discuss the actual concerns if Denise did have them. It would also have been useful to clearly separate concerns about the programme and what it is capable of achieving and those about its evaluation, i.e. capturing the achievements'.

A New Plan for the Evaluation

In the autumn of 2011, CUREE still had about a year left on its contract. Foundation staff said that they were eager to manage that relationship carefully and to avoid acrimony since CUREE's work had all been undertaken in good faith. CUREE's fees had been heavily weighted to year 1 and year 2 of the contract, and thus the fees for the final year were relatively small. Foundation staff decided that they would ask CUREE to carry out a new brief in year 3.

The Foundation asked CUREE to: (1) mine the data that they had already collected from the clusters to identify and report on data that would help provide evidence for nine hypotheses it had developed; and (2) prepare a number of illustrative vignettes and mini case studies to add to the evidence and data for each of the hypotheses. CUREE also offered to prepare a cluster by cluster summary on the strengths and weaknesses of each cluster. CUREE delivered those products, which Foundation staff found very helpful.

Theory of Change is Revisited

By autumn 2011, Barrows and her colleagues had become even more convinced that they needed to develop a theory of change for Learning Away. In October 2011, the Foundation held a workshop with the clusters to introduce the approach and ask them to begin to develop their own theories of change. It was important to create these theories of change, the Foundation team believed, to help everyone become clearer about the significant inputs and processes, probable pathways to change, and underpinning assumptions to test and evaluate, in order to gain new, evidence-based insights into why residential learning can make an impact on students and schools.

The work, which had begun about a year earlier, led the Foundation to set out nine key hypotheses, which subsequently underpinned its new evaluation strategy (see box for list of hypotheses).

Nine Hypotheses for Learning Away

Learning Away's evaluation efforts will be designed to test and gather appropriate data to evidence nine key impact themes and core hypotheses, i.e. that high quality residential learning programmes can:

- Boost attainment in the core subjects of English, Maths and Science.
- Improve student knowledge, understanding and skills in a wide range of curriculum areas.
- Improve students' engagement with their learning leading to improved attendance and behaviour.
- Foster deeper student-teacher/adult (and student-student) relationships leading to improved learner engagement and achievement.
- Enable teachers to widen and develop their pedagogical skills and repertoire.
- Improve pupils' transition experiences.
- Offer rich learning opportunities for student leadership.
- Boost cohesion, interpersonal relationships and a sense of belonging.
- Improve students' resilience, self-confidence and sense of well-being.

The Foundation's work on the hypotheses was informed by learning from the developmental work that had taken place earlier, including the findings from the formative aspects of the evaluation, Steele noted.

Evaluation: Phase 2

In October 2011, just a month after the steering group meeting with CUREE, the Foundation sent out tenders for an evaluation to cover the final three years of Learning Away.

'We had learnt from the first time that the brief needed to be clearer and more focused', Carne said: 'We had a much better idea of what we were asking our evaluator to do during this second phase of the evaluation. For example, we made it very clear to every organisation that responded that they had to tell us how they would set about proving or disproving the hypotheses we had developed'.

A Precise Tender

Steele added: 'The tender for the first evaluation had so many layers to it. It sets out the objectives for Learning Away, then goes on to the evaluation requirements, then talks about the scope of the evaluation and talks about evaluation approaches and parameters and data points. It was very complicated. In contrast, the second tender was more precise about what we wanted'.

The tender stated that the Foundation was seeking proposals designed to support two primary aims:

- Build a strong evidence base that will support four key Learning Away propositions focused on the belief that high quality residential learning: (1) has a strong, positive impact on academic achievement and a wide range of pupil-level outcomes; (2) can transform the learning experience of pupils; (3) can help transform schools; and (4) does not need to be expensive.
- Generate new insights and understanding about how and why residential learning can and does achieve those outcomes.

Within the four key propositions, the Foundation listed the set of nine hypotheses that it sought to test in Learning Away.

The requirements laid out in the tender included:

- A need for findings to have maximum credibility with a range of stakeholders, but particularly school leaders, the wider education sector, and the Foundation's board of trustees.
- A need for the evaluation to be data-based. There needed to be an empirical perspective on programme effectiveness relating to the core hypotheses. Where possible, mixed methods – both qualitative and quantitative – should be used to enable data triangulation and corroboration.

A New Evaluation Organisation is Chosen

The invitation to tender attracted 11 proposals, including one from CUREE, which partnered with the University of York which would have done the quantitative part of the work.

After an interview process, the Foundation selected York Consulting in the spring of 2012. York Consulting had been in business for about 20 years and was particularly well known for its work on impact and cost benefit analysis. The two partners of the organisation are economists. The organisation had also done some work in school improvement through government contracts.

‘Everybody instinctively thinks residential are positive things but how do you go about evidencing that impact? What is it that makes a difference?’ said Sally Kendall, Principal Consultant at York Consulting: ‘We thought we could bring more of a quantitative approach by bringing in surveys and data analysis to see if we could evidence impact’.

One reason the Foundation chose York was their ability to engage with and offer additional suggestions for the evaluation, the Foundation team said:

‘One of the things they felt they could add, which we hadn’t considered at all, was looking at some kind of value for money analysis’, Carne said: ‘That was an excellent idea’.

York Consulting’s approach also felt like a good fit with the Learning Away team, Carne said:

‘We were impressed that York Consulting understood that they weren’t just evaluating for us, they were evaluating with us’, he said: ‘We wanted to create an evaluation team. It was a shared enterprise’.

The York team meets with their Learning Away counterparts about every other month to discuss progress and any obstacles.

Turning to Online Surveys and Focus Groups

Under the new evaluation approach, schools choose only the hypotheses for data collection that they are working on, such as fostering attainment or improving engagement with learning. Most schools chose three or so of the nine hypotheses. York then collects information around those hypotheses.

Steele noted that schools had to consider the hypotheses and agree with the Foundation about which ones were the best fit for their work. The Foundation team guided them in those decisions. The schools were gradually becoming clearer about their own focus and theories of change but this process still was not straightforward for them, Steele said:

‘The challenge is because we have this huge breadth of what schools are trying to achieve, we don’t have a large number of cases to test each hypothesis’, Steele noted: ‘We will come out with some evidence but it will be from quite a small number of cases. Someone who would design an initiative from a research perspective would have a smaller number of variables. In fact, Learning Away was designed as an action research project, which developed into testing nine hypotheses across 13 clusters of schools. That makes it difficult to produce sufficient evidence to be convincing’.

Much of York’s data collection is around on-line surveying of students, teachers, and parents. Young people who are going on a residential answer about a 20-minute survey a few days before they go to get baseline data. They are surveyed again a few days after they return from the residential. Questions focus on areas such as what happened during the residential that had an impact and about relationships with teachers and peers. The students are asked the same questions about six months later to see if the impact and engagement with learning lasted.

Staff involved in delivering Learning Away complete pre and post residential surveys to capture their views on the impact of the programme. Parents are also asked to complete a survey after their child attends a Learning Away residential.

In addition, the Foundation's Learning Away advisers conduct regular focus groups with students and staff, under the guidance of the York Consulting team. The focus groups are used to understand more about the impact of the residentials and to test key assumptions about the factors that are most significant in leading to particular outcomes.

For statistical information, York Consulting is gathering data collected routinely by schools on attainment, behaviour, and attendance in those clusters where the programme is focused on improving outcomes in these areas. To help collect information on costs, schools will provide cost data in their annual reports. York Consulting is expected to provide preliminary cost data in 2014.

'I have to accept that they might not get the hard data that we want', Brighouse said: 'But my feeling was that at least they were energetically looking for things like attainment, etc.'

Once the evaluation got underway, the Foundation also commissioned York to do an additional piece of work: to ask participating schools about the impact that their involvement with Learning Away has had on participating teachers and the school as a whole. They are also carrying out a process evaluation of the Foundation's approach.

Questions about the Evaluation Budget

The budget for the three-year evaluation is £110,336. Learning Away also assigned two Learning Away advisers to conduct focus groups of pupils and staff on an annual basis. Even with the additional funding and staff, the Foundation realised that they likely did not initially set aside enough of a budget for the evaluation, Carne said:

'As the evaluation with York Consulting has developed, we have realised we needed to ask them to do more than was originally anticipated. The approach is taking more of their time than originally budgeted for', Carne said: 'I think that we have all realised that this kind of evaluation, given its importance, needs significant budget. I'm not sure that was fully recognised at the beginning of the programme when budgets were first outlined'.

Overall, the new approach seems to be a good fit for Learning Away, the Foundation team and school staff said:

'As a general feeling, everyone was quite refreshed by it', said Karen Blackwell, a science teacher at Canterbury Academy: 'As they went through the research tools, there was a continual consultation with us in how we work in our schools. They - York and Learning Away - consulted with us to come up with the main outcomes that we were working toward and then put those outcomes into the tools. They were going to evidence what we were doing without too much work on our part'.

When York made a presentation to the schools about their approach, Ronnie Bleach, a pupil support manager at Calderglen High School, admitted feeling a bit wary:

'I thought, 'I've finally cracked the first evaluation a wee bit and now we're changing'. Bleach said: 'But they presented that they were doing a lot more of the ground work and the crunching of the data. We just have to use Survey Monkey. I thought that that will be a lot easier for me in the school and it has been. The biggest challenge is where we miss some kids and staff in doing the surveys and trying to catch up with them'.

Bleach also said that it has been difficult to get responses from parents.

York Submits First Report

In June 2013, York submitted an interim evaluation report on its findings from the pilot phase of its evaluation, which covered the residential that took place in one term, the summer term of 2012. The evaluators received the following surveys from 31 schools relating to 24 residential: (1) 1,752 pre and post pupil surveys; (2) 87 parent surveys and; (3) 27 baseline surveys from staff and 27 post residential surveys from staff. No six-month follow up surveys had yet been completed by the pupils.

Among the report's conclusions:

- Findings clearly show that Learning Away residential were valued by pupils, staff, parents, and schools. The evidence shows that many of the positive impacts seen on the residential, for example on the development of relationships, confidence and engagement with learning, as well as the delivery of learning, were also being sustained back in school.
- There was also evidence of improved engagement with learning, leading to improved confidence, engagement and progress in learning back in school. Residential provided an environment where pupils could develop their confidence and skills, for example, in relation to speaking and listening in a 'safe' environment. Staff and pupils identified that the residential provided a more relaxed working environment where pupils felt more comfortable asking their teachers for help because they had got to know them better.
- The five clusters focusing on improving attainment were seeing evidence of impact. Overall, 53% of (secondary and junior) pupils felt that the residential helped them do better in their subject(s)/school work and 52% felt that they will do better in their exams/tests at school as a result of Learning Away. For example, secondary students identified specific impact on their progress and attainment during focus group discussions, including moving up a set, working at a higher level and achieving better grades.
- One cluster provided additional quantitative attainment data based on test results. The initial analysis of this data provided further evidence of the impact of residential on pupils' attainment. This showed that over a third (39%) of residential students improved their Maths score in a test taken before and after the residential, compared to only 14% of the 'comparator group' who did not attend the residential. More than two-thirds (69%) of the residential group achieved a C grade at Maths GCSE, compared to none of the 'comparator group' (all students were C/D borderline).

Bringing the Two Evaluations Together

It was in conjunction with the York report, that the value of CUREE's initial work became most apparent, Carne said. While York was able to provide preliminary information showing that residential help to improve attainment and other measures, they did not have enough evidence yet on *why* this is the case. That's where CUREE's year 3 report has been valuable, Carne said:

'I've spent a lot of time recently sharing our findings with the wider educational world at conferences and events and have needed to say not only that residential learning has a significant impact, but why they have such an impact', Carne said: 'I would not have been able to do that just with York Consulting's first interim report. The final CUREE reports have been very useful in this respect'.

The CUREE work has also helped York and the Foundation think more carefully about what questions to ask in focus groups. For example, CUREE's report showed that the teacher-student and student-student relationships that take place during the residential learning appear to be important in the overall impact. Those relationship questions can be probed more deeply in the focus groups.

In late 2013, York was collecting data over a full school year from pupils, staff and parents as well as additional quantitative data on attainment, attendance, and behaviour. York was also writing case studies about the clusters to illustrate impact of the programme. A second annual report is due in March 2014 and a final report is expected in February 2015.

'One of our ongoing challenges is to ensure that the schools continue to provide evaluation data', Carne said: 'The teachers have a key role to play in organising the surveys and focus groups, both for the students and themselves. We must make sure that they don't put all of their energies into planning the delivery of their residential learning successfully and then forget how important their evaluation evidence is'.

Closing Remarks

In 2008, the Paul Hamlyn Foundation set out to fund a bold initiative in residential learning that would investigate and demonstrate just how powerful residential learning can be for students. The aspiration was to build a body of knowledge and practice, through working alongside a core group of committed schools, that could then be used to encourage schools across the country to increase the extent and quality of their residential learning provision.

Foundation staff knew they wanted this ambitious programme evaluated. However, they struggled with how best to articulate what they sought from the evaluators, and then what didn't seem quite right about it as they received initial progress reports. The first team of evaluators wrestled with how to meet a seemingly large number of needs from the Foundation - rendering judgements, facilitating improvements, and generating knowledge. They were steadfast in their convictions that their approach was the best one to get the information the Foundation sought. At several junctures, Foundation staff and the evaluators seemed to talk past one another.

Even with those difficulties the work of the first evaluation provided valuable data and insights that both informed the Learning Away programme and the second phase of the evaluation. In particular, the thematic work and case studies generated by the first evaluation are proving useful in helping the Foundation team explain to outside audiences why residential learning can make an impact on educational attainment and other measures.

When the Foundation decided to seek a new evaluator, it had the advantage this time of a clearly articulated set of hypotheses to guide the new evaluators. While it is still early, the Foundation team has hopes that the evaluation will generate the impact data it has been seeking to influence schools in adopting more residential learning programmes.

For foundations interested in strategic philanthropy, Steele offered these thoughts about how to approach evaluation based on the experience with Learning Away:

‘One of the things I keep banging away at is the utter importance of the clarity of aims’, Steele said: ‘Once you have that clarity, then how are you going to plan that work and in what phases and steps? A key part of that process is about foundations being more explicit about owning a theory of change in their initiatives and involving evaluators at an earlier stage in crafting those theories of change. We also have to be clear about how we want to get to the position of potentially making a much bigger influence than our initiative alone can make. How do we design our work so we have the best chance of assuring a long term legacy? That’s what strategic philanthropists need to think about’.

Timeline of key events

- 2001-2007: Paul Hamlyn Foundation assets triple to £550 million
- 2006: Foundation begins funding special initiatives as part of an effort to be more strategic and have more impact
- 2008 (January): Learning Away initiative launches with a six-year £2.2 million commitment
- 2009 (Autumn): First evaluation tender is issued
- 2009 (December): CUREE receives a three-year evaluation contract
- 2010 (Spring): SET evaluation tools are presented to schools
- 2010 (Autumn): CUREE presents its first evaluation report
- 2010 (December): Foundation develops a theory of change for Learning Away
- 2011 (Spring): Peter Carne (Project Leader) and Jane Steele (Head of Impact and Evaluation) join the Foundation
- 2011 (September): CUREE presents its second evaluation report
- 2011 (Autumn): Foundation identifies nine testable hypotheses for Learning Away
- 2011 (October): Second evaluation tender issued
- 2012 (Spring): York Consulting receives a three-year evaluation contract
- 2013 (June): York issues first evaluation report on the pilot phase of its evaluation
- 2014 (March): Second evaluation report is due
- 2015 (February): Final evaluation report is due.