



SMALL CHANGE, BIG CHANGES; THE LARGE IMPACT OF SMALL GRANTS FOR STUDENTS

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Introduction

This paper seeks to describe a journey; one philanthrocrat's journey to discovering impact when, and where, she hadn't expected to find it.

The aim is to demonstrate that if the right evaluation philosophy is used, then against intuition, small grants for individuals can demonstrate impact. Establishing rapport, and ongoing communication with partners is key in this process. Existing alongside the timeline of more structured data collection points (financial reports and project outcomes reports), a relationship of ongoing evaluation and communication can reveal outcomes besides those intended/sought by the partnership.

Wyatt has been around for 125 years and there is no attempt to cover the historical process that has resulted in our grant-making today. But, any philanthropic organisation that has been around longer than 20 years can appreciate the move towards metrics. Indeed younger organisations can also appreciate their importance, as we certainly now exist in the age of measurement.

There is now a need to demonstrate that, as well as creating output (expenditure), particular philanthropic efforts seek particular outcomes. Projects are valued further if they, potentially or actually, create impact.



I will not be going into the debate about how important these considerations of measurement should be. Rather I take it as a given that we are all, rightly or wrongly, for better or worse, more focused on this particular task in philanthropy than in previous decades or centuries.

This paper will first offer a very brief description of the Wyatt Benevolent Institution. Second Wyatt's relationship to measurement of outputs and outcomes will be discussed in the context of the Wyatt Education Portfolio. I will then move into a discussion of impact through looking at one specific partnership within the Education Portfolio. Specifically, I intend to demonstrate that impact can be revealed if the grant maker is prepared to listen and look for it.

Wyatt's Mission and (a very brief) History

Wyatt offers opportunities for South Australians experiencing poverty so they can lead satisfying, productive lives and participate more actively in the community.

In short, we provide funding to South Australians experiencing financial hardship.

Dr. William Wyatt conceived of the idea of a trust in 1881. Perhaps, in determining that his funds would be used in perpetuity, Dr. Wyatt was seeking to create impact. Through improving the lives of individuals over a long period of time, he may have sought improvement to the community of South Australia at the collective level. If this was the case, Wyatt was not unusual in his impact-seeking approach given the late 19th Century prevalence of methodological individualism¹ in the social sciences.

Many philanthropic organisations are specifically precluded from funding individuals. With 'named individuals' the sole focus of Wyatt's grants, there is the ability to provide a form of assistance that many bigger picture programs are unable to provide; small grants for individuals.

Prior to the Harvester Judgement of 1907, often reported as the birth of the Modern Welfare State (Macintyre, 1999), The Wyatt Benevolent Institution was administering regular benefactions to

¹ Methodological Individualism is the doctrine which views larger scale (macro, or structural) phenomena as resulting from individual actions.



eligible individuals. This practice continues to this day, where we have two individuals still in receipt of monthly benefactions.

From a focus on individual benefactions, made regularly to named individuals, Wyatt began to extend its reach through agencies and professionals seeking assistance on behalf of individuals whom they were supporting. These relationships are structured in various ways; some as referral relationships for one-off assistance through Wyatt's Small Grants Program, others as partnerships, where funds are administered in accordance with our Trust Deed by partners across our four priority areas; housing, financial wellbeing, employment and education.

Partnerships and Priority Areas – Thinking about Outcomes

Wyatt's interest in outputs, how much is given, to how many, has existed since its inception.

But several decades ago, we became interested in outcomes as well as outputs. In 1985 Wyatt employed its first social worker. The Board sought a skillset that, among other things, "could report on the conditions of individual applicants for income supplement" (Fort, 2008, p211). The background experience and skillset of this employee "had exposed her to some of the major causes of financial hardship and encouraged her conviction that assistance should always be constructive in the long term...a tool in a whole package of getting somebody back together and on their feet" (ibid, p12-13). There wasn't a focus on measurement, but outcomes were a key factor underlying grant making decisions; both in terms of the circumstances of the individual grantees, and the items which were funded.

Whilst outcomes became a major driver of assessing individual grant applications, partnership potential and recommendations, they could not, and can never be, the sole driver. In the 21st century, as in the 20th and the 19th, we are still guided by the Will of Dr. Wyatt in terms of whom can be a beneficiary and how.

Sylvia Geddes, highlighted this tension in 2007 when discussing the argument that philanthropy should be focused only on the bigger picture approaches; "supporting prevention and promoting social and policy changes", with the fact that "The capacity to behave as if a charitable trust is an



independent organisation depends on the provisions of the legal instrument by which it was established” (Geddes, 2007, p5).

Whilst Wyatt expends significantly every year, particularly in relation to other South Australian Philanthropics, the organisation is not free to expend this in any way in order to achieve outcomes; our Trust Deed is quite prescriptive in terms of its method, and is the lens through which all decisions are made.

But we can seek outcomes. Further, we can measure them. This next step in Wyatt’s journey of measurement is discussed below in the context of the Education Portfolio.

Wyatt’s Education Portfolio – Outputs and Outcomes

Through the Education Portfolio, Wyatt seeks to support school retention of 1000 young people between 2011-2016. The ultimate goal is retention to successful completion of year 12 or its equivalent, but each year beyond year 10 is seen as a successful outcome for the year.

In terms of outputs; we can measure these in terms of dollars.

Further, due to the Trust Deed requiring records naming the individual beneficiaries of grant making, Wyatt can measure this in terms of the number of individuals assisted. In 2011/2012 Wyatt’s Education Portfolio granted assistance of just under half a million dollars to just over 1000 individual students or their families².

Do they all have potential to be measured in terms of our desired outcome of retention to year 12? No they do not. Wyatt’s knowledge base informs us that to seek to address only the needs of upper secondary students in the final years of retention is less likely to have an impact in terms of influencing a change in longer-term life chances.

Through consultation with partners as well as a review of research and knowledge about school retention and attainment, Wyatt understands that retention challenges develop long before the school leaving age. The South Australian Government’s Flexible Learning Option (FLO) funding recognises this, and is now able to be accessed for students in Year 6 and Year 7. Numerous

² Some EOFY reports are still being analyzed.



Studies on Early Childhood Education and Development inform that an earlier intervention is required if one is to really tackle the problem of educational disadvantage.

As well as accessing educational support through literacy and numeracy assistance, and having access to social and material resources to consolidate learning, familial expectations and feelings towards education are also seen as critical to outcomes.

In accepting the argument for earlier interventions and promotion of positive family relationships with education, Wyatt has made a strategic decision to ‘sacrifice’ some budget and short-term outcomes to support initiatives which tackle the most entrenched intergenerational disadvantage at the Early Childhood level. We are seeking to effect change. We want our grant making to have an impact for the recipients, and the social issue we are interacting with; in this case inequality in education outcomes.

But for those we can count, those in years 10-12 (or their equivalent), we monitor our recipients via a destination/transition survey. Each partner informs us of the status of students in February the year after funding has been received. This data shows who has been retained beyond year 10, who has left school, who has moved to another school or into employment and whether there are any students whose destination is unknown.

Does this mean our funding has caused this outcome? No. To make that claim would not only be disrespectful to the efforts of the student, school staff, and the families struggling to make ends meet and support each recipient’s educational journey, it would also be untrue.

As most will recognise, direct causation is impossible to determine in social environments. The lack of controls and an experimental context in which to test hypotheses without intervening variables/factors mean we must be comfortable with correlation instead.

The Evaluative Triad: Output, Outcomes and Impact

Wyatt can assert, that we create significant output with our educational grant making.

Now that we’re measuring the outcomes, and with an acceptance of correlation we can also assert that we are supporting the school retention of our recipients.



The next challenge for us is impact; can an organisation who provides assistance to individuals, not programs, lobbying groups, and staff costs, but individuals in hardship, have or create impact?

What is impact?

Can Wyatt Achieve Impact?

The search for a clear definition of impact is an interesting one. Like most words adopted by different industries and disciplines, there are multiple meanings. They are not all incongruent, though it remains a challenge to find one clear conceptualisation. Even disregarding other industries, there are competing definitions within philanthropic and social evaluation discourses.

The OECD in its Key Terms of Evaluation defines impact as value-neutral; “Positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended” (Development Assistance Committee, 2010, p24).

Larry McGill offers a more valued assessment when he states “Social impact...takes place at a collective level that extends far beyond the reach of any one foundation or non-profit organization. It takes a village to make (and measure) collective impact.” (2011). For McGill, it appears that no one organisation or program can deliver impact. But both the OECD and McGill posit that a long-term time frame is central to the emergence of impact.

There are alternatives to this temporal approach. Another OECD resource omits the long-term consideration as critical to impact assessment;

Project impact evaluation establishes whether the intervention had a welfare effect on individuals, households, and communities, and whether this effect can be attributed to the concerned intervention (Development Assistance Committee, 2006, p1)

A more critical assessment of impact as long term and large-scale effects triggered attention during the search and resonated with intuitive understanding;

...indeed what better measure of impact is there than whether and to what extent an investment has had traction beyond a list of stipulated outputs or outcomes that the organization and/or investor wanted to see? That list could be expanded to include looking



at whether and to what extent organizations supported by charitable donations are enhancing the ability of the communities they serve to address issues beyond what they were primarily funded for or within narrow programmatic outcomes (Gibson, 2011)

This understanding of impact alluded to the fact that interventions can have effects beyond the intended target whether that be an individual, or a group. In order to discover impact, this conceptualisation asks us to look at what else, besides the results being sought explicitly as outcomes, is being achieved.

Through utilising a method of ongoing evaluation and encouraging unstructured dialogue with partners, alongside standard methods of output and outcomes measurement, the ‘impact beyond the outcome’, of Wyatt’s grant making has been discovered. This is now illustrated using a case study of one of the partnerships managed by myself, The Bultawilta Program.

The Bultawilta Program

Bultawilta began its life as a program in 2006, and was then called the Wyatt Indigenous Advance Awards. Since its inception, this program has provided over 300 Indigenous High School Students with funding to assist them at school. There are currently 13 Bultawilta partner high schools in South Australia, including two in regional areas.

The funding serves to fill gaps; where to not fill them would result in financial outlay for the recipient or them missing out altogether

Funding is held by the school, and allocated to eligible individual students who can each receive assistance of up to \$600 per year. Funds are used for a variety of purposes due to the fact that each school has a different configuration of supportive resources available to them³. Bultawilta is highly valued by our partner schools for its flexibility. Expenditure decisions depend on the needs of the students, and on other resources available to the school.

³ School funding networks are typically comprised of; state and federal funding, local and commercial enterprise arrangements and partnerships with business and NGOs/NFPs.



How are outcomes measured? Like most partnerships in Wyatt's Education Portfolio, school retention is the goal, and each year spent in post-compulsory education is considered to enhance the longer-term life chances of an individual⁴.

The goal has always been to remove barriers to Indigenous School Retention. Originally this was based on the logic that providing assistance at upper secondary level was most appropriate. Further, Wyatt has always understood that social inclusion was a factor in retention, and so, alongside tutoring, uniforms, stationary and other core educational expenses, funding has been used for formal tickets, suit hire, school photographs, and other expenses which many may call 'non-essential'.

Consultation with partners informed that improving school retention required earlier intervention. Whilst the open dialogue with partners was the catalyst for change, a review of research backed this up and offered an evidence base for allowing partners to administer the financial assistance to students from any secondary year level.

So the program has evolved along with Wyatt's knowledge of the field in which it is granting. The program has also evolved as a result of changes in evaluation methods, where ongoing evaluative inquiry was employed to complement the collection of quantitative and qualitative data on outputs and outcomes, (who received how much, and how the funding was used to promote retention).

Bultawilta's Impact; Discovery depends on Relationships.

In the more common understanding of impact (long term and larger scale), and viewed through the lens of methodological individualism these small grants for individuals, through each achieved outcome, are contributing to Closing the Gap. Out of the 115 students who received funding in 2011/2012, 69 of these were retained beyond year 10 into the next school year⁵. Without claims of causation, our funding is assisting student retention and completion.

⁴ This is a contested argument for particular individuals in particular educational and structural settings. Wyatt however, supports retention in education which appropriate to the circumstances of the individual; be that off site flexible education, family friendly class rooms, or other non traditional settings.

⁵ The majority of the remaining students were still in junior secondary school and whilst retained into the following year, could not be counted as outcomes.



In addition, casual conversation with partners revealed (to steal another term from the social sciences, this time from classical economics) the discovery of unintended consequences. In conversation with new staff members at one of the partner schools, whilst we attended to the standard tasks of handover⁶ one staff member praised the flexibility of the funding. This was not new, many partners have valued the fact that Bultawilta funds essentially act as brokerage for the individual, and can fill different gaps depending on the needs of the student, their families, and other support structures the school may have negotiated. The staff member continued and relayed how he was aware that in the year before a Physical Education Camp was made possible by the Bultawilta Partnership.

Alarm bells sounded; “oh no, they’ve funded a program, not an individual, they’ve acted outside guidelines, I’m going to have to start off this relationship as the ‘no’ girl!!!” I took a breath and queried as to how this was possible.

Essentially, this was possible as a result of the cost/benefit analysis which is performed daily at school sites. A minimum number of students were required to make the PE camp possible in terms of funding the release of staff to attend/supervise at the legal ratio and the school was short several student ‘heads’ to make the trip viable for the school budget. Two students indicated that they wanted to go but weren’t sure if they had enough Bultawilta funds left. They did have enough, and they drew on these funds. The camp went ahead, and additional senior secondary students who weren’t grantees benefited from two small grants for individuals as a result.

Letting conversations like this feed into ongoing evaluation is key to discovering wider impact of the sort discussed by Gibson. These conversations arise when there is rapport between partners, and when the structure of interactions is loose enough to allow deviation from a focus on dollar output and numbered outcomes. I now include questions about individual grants benefitting others in my discussions with Bultawilta Partners and have been amazed at the responses, as well as the discovery of other instances of impact. For example,

Students using their scholarship funds to buy school photos for their siblings: The partner teacher at this site was a little baffled in the choice of expenditure, but said a home visit left her with no

⁶ Whilst staff turnover is a challenge for any grant making partnership, I have found school staff turnovers to be a constant phenomena in my portfolio, so that rather than viewing it as a challenge, it is simply part and parcel of the relationship. This understanding and preparedness saves a lot of stress, and also allows the partnership to flourish rather than be seen as problematic.



question of the importance of the purchase. The household was full of school photos; and the symbolic power of the imagery around the house was evident to the teacher. She says “School photos are hugely important – on display everywhere and the family are very proud of the children’s schooling” (Wyatt Partner, 2012, Personal Correspondence).

The same staff member has noted many instances of students purchasing items for others; nearly all of the recipients ask whether funds can be used to buy school supplies and other items for siblings and extended family members. The teacher wrote to me when I sought more information on this phenomenon,

I am not sure if the Wyatt funds were set up to provide for families but that is certainly the case at SCHOOL NAME...I am continually amazed about the sharing that occurs in our Aboriginal families compared to our non-Aboriginal families” (Wyatt Partner, 2012, Personal Correspondence).

A slightly different example of impact can be found in a strategy of student self-management of funds. Here impact is not revealed through additional beneficiaries, but by additional, non-monetary benefits for the individual grantee. Again, during a routine discussion of the financial reporting requirements with a school contact person, we were discussing how different partners manage the recording of expenditure prior to submitting the data on the Wyatt template. Like all partners, the funds were held in the school account and the finance officer drew on these when requested by the school contact or the student. However, unlike many sites, this contact thought it important that the recipients were aware that whilst the funding could be used for various items, once expended, there would be no further funding until the following period (Semester or Year). A system of student self management has been developed where young people will go and speak with her about what they would like to purchase, the student checks their ‘budget’ to see if they have enough funds left, and also discusses what else they may need during the rest of the funding period. For example, if they would like to purchase a replacement uniform item for a younger sibling, they may do so, but may perhaps want to also ensure they have enough funds left to purchase their formal ticket. This self-management strategy is not only teaching basic budgeting skills, but also responsibility and care for items. She writes:



There have been many other benefits and positives for the students...the awards have given the students some power over their education – we have set it up so they are in control of their \$600. They must have their own budget and work from that. They have all felt a sense of pride and achievement and have felt important.

Conclusion; To Discover Impact beyond Outcomes, Ongoing Evaluation and Semi-Structured Conversation is Key

The introduction of a focus group methodology for annual partnership reviews has proven effective for allowing impact to flourish beyond the individual Bultawilta partnership. Once aware of the student self-management model I deliberately included a discussion of this with each focus group⁷. An Excel template was developed which could be voluntarily used by partner schools and structured it in such a way that the financial reports could be generated from the spread sheet and signed off, thus saving the partners' administrative time if they opted to trial the approach. Two schools picked it up immediately, with one principal now wondering whether the practice could be converted into numeracy credits for the South Australian Certificate of Education. Again, wider impact, beyond the outcomes sought, is revealed through conversation rather than more structured methods of data collection.

Whilst systematic data collection and reporting is critical to our work, both because of our trust deed and also for dissemination of knowledge regarding our practice to a wider audience, the importance for allowing space in a partnership for informal conversation and exploration of wider effects of your output is crucial if you want to discover the impact beyond the outcomes sought by philanthropic funding.

For me, it has demonstrated what I intuitively felt; that impact is not only the concern of large scale strategies, but can be created with a \$600 grant to a 15year old student.

⁷ The 11 metropolitan schools were divided into geographical clusters and the focus groups were held at a central school either at the beginning or the end of the school day, depending on the preferences of the majority.



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