Pears Foundation

1 Introduction

2 At the convening of the Evaluation Roundtable in January 2019, we considered how
3 two foundations – Corra Foundation and Pears Foundation – were working to 'make
4 learning everyday'.

5 The foundations shared much in common, giving careful and sensitive consideration to
6 questions about power, behaviour and contribution at all levels of their organisations.
7 But their approaches to learning were markedly different. At the convening, we used
8 their experience and the choices they had made to explore what it actually takes to
9 embed learning into the way we work.

10 Eighteen months on, the environment has changed beyond our wildest imaginings.
11 People and systems are under stress in unprecedented ways. Facing a volatile and
12 uncertain future, foundations need good learning more than ever to support tough
13 decisions about maximising their contribution. In support of our discussion at the
14 2020 convening, we asked Corra Foundation and Pears Foundation to share how
15 their approach to learning has performed under pressure and to give us their initial
16 thoughts on how this will influence the way they learn for the longer term. This case
17 considers the experience of Pears Foundation (Pears).

Who Pears was going into the pandemic

Mission and values

Pears Foundation is fundamentally an expression of the values of the three Pears brothers and their aspiration to use philanthropy as a transformative force in society. Funds are drawn from the resources of their family's property company. All are trustees, and closely engaged with the work, especially through the role of the full-time Executive Chair.

Pears' vision and underlying mission are broadly framed, setting out a commitment to be part of a 'global effort to break down barriers to progress, inspire young people and others in active citizenship and create spaces for passionate people to develop their ideas and apply their talents' – all with the aim of 'making people's lives better, wherever and however we can'. Grants support organisations engaged in the causes that trustees care about, who welcome a very close relationship with a highly engaged funder: *'Relationships are at the heart of everything that we do. We're not just about the money; we play a very active role in supporting our partners* [grantees] *while they develop, and we stay with them for the long term'.*

Learning approach

The Pears approach is all about identifying good people, doing good work, learning with them and helping them to do better. The commitment to going on a journey with a project or charity is an essential starting point, underpinned by unrestricted core funding, available for the long term: *'For us, "commitment" comes first ... Once you do that, the learning comes ... It's a continual, evolving process'.*

So, learning is what the Pears team does – above almost anything else. And the central purpose of this learning is to support organisations to do what they do well. Broadly, there are four key learning priorities:

- **Creating meaningful and trusting relationships with partners** – time, thought and money are committed to the careful nurturing of the trust and honesty fundamental to deep learning: *'we're going on a journey together and you've got to share some of the things that you don't know the answers to, that you're struggling with, and we'll share the same'.*

- **Understanding 'real life' organisational development** – Pears is actively engaged across a number of sectors and in deep, challenging conversations with its partners about their work and context. As well as learning how best to support each partner, the team is building intelligence that enables Pears to be more effective overall: *'A bit like one of those artificial intelligence machines – the more learning we can absorb about how organisations grow, develop, evolve, the more we can help'.*

- **Being well-informed** – the Pears team members are *'avid consumers and collectors of information'*, spending a lot of time out of the office visiting grantees, going to conferences and seminars, connecting with other funders and so on.

- Sharing learning effectively as a team – there are challenges in unpacking learning from intense individual relationships to create a shared organisational resource. Team members talk a lot and bounce ideas off each other. Every Friday is *'open plan office day'*, with everyone in the same space with no external meetings: *'It's a day where there is much more acceptance of interrupting and talking or of peeling off to have a coffee and a conversation'*. And Pears uses formal techniques (such as polarity management, Myers Briggs and Belbin) to support reflective learning, dedicating the annual team awayday to big questions for Pears and its practice, concentrating on making connections and spotting patterns by looking at all of its different styles, portfolios and grants together.

Long reliant on historical memory, supported by a stable team and the role of the Executive Chair, at the time of the 2019 convening Pears had recently introduced a more formal relationship record to its grant management system to help address the risk inherent in its approach. The team was teasing out what kind of record would add value, without trying to mirror the complexity of real-life relationships between individuals: *'What is essential to pass on, that a colleague can learn from and needs to know, and what just adds colour to it in my head?'*. The emerging answer was that the focus should be on identifying and managing risk – which for Pears clearly includes the risk of missing opportunities and potential – so that this knowledge is recorded and available as an organisational resource, not just shared informally.

How Pears has responded to Covid-19

Pears' focus has been on working with existing partners *'to help them navigate and respond to the current crisis'*. Its big early decisions – to increase expenditure by 50% across the year to £30million; to increase the flexibility of individual grants, most of which are already unrestricted; to automatically renew all core grants due for review during the 2020-21 financial year at existing levels for another 12 months – were instinctive and straightforward: *'they felt driven by impulse. These are the easy and freeing decisions.'* It also wrote to all grantees after signing the funders' joint statement of support for the sector, coordinated by London Funders: *'the principles resonated with us and we felt we were already consistent with many of them but felt it was important to communicate this explicitly'*.

Trustees and the team then worked together to tackle the more difficult question of targeting their immediate funding response: *'The big strategic question for trustees was "What do you fund? How and when?"'*. Within a month of lockdown, Pears had distributed £1.3million in core funding, both to support frontline grantees facing increased demand and logistical challenges in their work with vulnerable people, and in response to some partners' coronavirus emergency appeals. These included unasked-for donations, particularly to organisations that operated helplines. This was a period of intense listening to partners and responding to their immediate concerns.

Then *'we had to pause to think about how to act more collaboratively. The systemic issues are so huge it's hard to know how to really help. Every sector has its distinct challenges – and we work across a lot'*. One result has been a partnership with Paul Hamlyn Foundation and the Government's Community Match Challenge scheme to make available £11million (£5million from Pears) to support frontline charities working with those most affected by Covid-19 in three existing areas of its work: social care, young people and mental health. Funds are being distributed through established Pears partners who have strong links into local services. Pears also continues to progress funding relationships with potential partners identified before the crisis.

How Pears' learning approach has performed under stress

Strategy and culture

Faced by lockdown and remote working, the Pears team transitioned quickly on a practical level. Clear strategic alignment on building long-term relationships that adapt to changing circumstances meant the decision to focus on supporting existing partners was easily made.

However, with a way of working built on relatively light formal structures, informal contacts and physical proximity within the team, the underpinnings for learning and subsequent action suddenly felt shaky: *'It revealed such a flaw in our risk management – we didn't think about the loss of human connection'*. Like everyone, Pears has found ways to adjust and carry on. But there is a strong sense that *'we are running on reserves of trust and knowledge'* and concern about how these reserves can be both created and refreshed at a distance and in a situation of *'radical uncertainty'*.

Trusting and meaningful relationships

Pears has had to move quickly in support of partners without the deep discussion that would normally characterise these interactions: *'We're learning how to diagnose quickly and imperfectly – riding on the coat tails of the relationships we have developed over time. We know the people and the organisation and use our instincts to help them'*. It has so far proved relatively straightforward to maintain established relationships through online contacts, and the hope is that Pears will replenish reserves of trust simply *'by doing the right thing to help'*.

As the crisis has played out, Pears is beginning to learn where its contribution might add particular value. For example, Pears' understanding of organisational dynamics is a useful resource for partners who have gone through tough decisions about cutbacks and redundancies: *'People in this sector aren't good at separating role and self. Part of the support has been to help them depersonalise, to understand that "none of this is your fault"'*. And the length of many of its relationships offers a perspective that supports decisive action: *'Some partners are seeing big opportunities to implement change, often alongside pressures from*

their teams to put things back where they were. I can remind them that they've been complaining about something for five years and ask, "What have you learnt from all this disruption that will help you to build back better?"'.

Managing new and developing relationships feels much harder for the Pears team. There is an imperative not to create a burden on hard pressed organisations: *'How much time am I able to spend with them at this stage? It's usually quite intense – we see it as a down payment on a long term relationship'.* And the nuances of physical meetings are lost: *'it requires much more explicit trust building – you have to do a lot to create a safe space'.* Pears is excited by how the ease of online contact has increased the flow and openness of communication: *'Accessibility is a major bonus. And there is a general desire to connect – people want to talk and think through with others'.* But its concern is that connection has become much more *'single channel'*, losing the nuance and variety of contacts that previously characterised their engagement with partners and challenging their learning approach: *'Learning by osmosis calls for multiple inputs'.*

It is hard to vary the lightness of interaction, to *'replicate the "10 minutes in the margin of a conference conversations" – arranging a meeting gives it too much weight'.* Pears has become increasingly aware that these informal contacts aren't just efficient but are *'the essence of what is needed to get drip fed learning and insights'.* The team is consciously varying communication methods, sometimes making phone calls instead of Zooming, or structuring video calls round shared documents rather than faces. But achieving *'very light'* contact, and doing so without blurring professional boundaries, remains a challenge: *'Something like WhatsApp contact with partners could stand in for quick chats but instinctively that feels too personal – like they are one of the team. Something is missing in the toolbox here'.*

Pears' concern is that an extended period of isolation and remote working might undermine their *'commit, learn, refine'* approach to funding: *'It has brought home to me how much we commit upfront on the basis of gut instinct – and need the multi-layered picture of meeting face to face to do that. We need to "eyeball it". If we can't, we may be pushed into something more traditional'.*

Understanding organisational development

Pears has long experience of turning individual impressions and knowledge in the team into shared expertise around organisational development and barriers to change. Now working to create plans and contingencies for a radically uncertain future, the Pears professional development programme is offering a space where partners can interrogate their context, build their skills in adaptive leadership, and explore common challenges.

The Director of this programme has long experience teaching on Zoom but had been reluctant to move away from face-to-face: *'I was confident about my ability to teach but not about people's skills and comfort online. Now everyone can do Zoom and I can teach on it'.* All professional development is now online, with multiple courses available and excellent levels of participation. This has escalated Pears' own learning about effective delivery and the limitations, as well as the positives, of the approach: *'Trust building is slower and more difficult; you need to allow more*

time for, for example, the things people would do in the breaks; I can't feel the room so I need to give real attention to everyone. There has been huge learning for me as a trainer – stretching my skills'.

More broadly, Pears has learned how crucial it is to give a strong 'why we are investing in you' message to partners: *'People are hungry for professional development. And the feedback is that the learning is important. But so – perhaps even more so – is the fact that someone cares, is paying attention and supporting them'.*

Being well informed

Pears has always placed great importance on experiential learning, drawn from in-person contact such as site visits, conferences, and seminars, as well as on day-to-day intelligence gathered through publications, formal and informal online sources, and social media. It consciously keeps tuned in to a range of channels and sources of information. But the flow of information and conversations during the crisis has often felt overwhelming: *'I've assimilated as much information as possible but it's hard to know how to focus my time – assimilating, sharing, keeping an eye across everything?'.* The small team works across a wide range of sectors, most of which *'are still working out what the reality is – and don't think they will know for some time'.* Despite that, Pears has found energy and ideas to draw on. Intensive listening to partners has created some *'A-ha moments'*: *'They were talking about teachers' mental health and I thought "why weren't we on this already?" We do a lot of mental health and a lot of young people's work but never thought about this'.* And some great conversations have emerged from being able to bring unusual groups together, as in a recent virtual visit to a youth club in Leeds.

Sharing learning as a team

Although aware of the vital role that being together in the same space has played in supporting learning, the impact of remote working has surprised everyone: *'We've learned just how dependent we are on the contact. We thought we were just missing each other but it's more fundamental'.* The Director can no longer easily maintain a light touch overview: *'What I really miss is looking up from my desk when I heard a snatch of conversation – it's like missing one of my senses'.* And there have been *'some weird glitches in process that just wouldn't have happened when we were overhearing each other's conversations'.*

Pears has added some formality to protect space to communicate, increasing the number of meetings slightly. The team is also now consciously writing *'yelling across the office'* emails: *'We had to build it in, while keeping it light in tone – because it felt pedantic'.* WhatsApp has become important – *'just as a place for bouncing ideas'.* And people are more flexible about their hours of working because *'boundaries feel less important than keeping in touch'.*

With IT support and infrastructure provided by the Pears family's property business, the Foundation had limited flexibility to introduce new IT-based systems to support its communication. The roll-out of Microsoft Teams by the business has made it much easier for the team to interact more spontaneously and informally.

The contact records data system being developed at the time of the 2019 convening has also helped, enabling *'more collecting of shared information and identification of commonality across grants'*. And, throughout the crisis, it has made it easier for both the Executive Chair and the Director to maintain an overview of contacts and key issues at a distance.

The Pears team has found it hard to maintain its discipline of deep reflection: *'there is no sense of closure – we still feel in the thick of it'*. So, it has been working to develop techniques to help it function in radical uncertainty: *'We might say "We don't know the answer, so this is what we are going to do for the next 3 days". This is not at all like us; we like a plan and a process'*. The annual team awayday proved *'a bit of a turning point'*. Although more difficult to manage, maintaining the structure of holding *'our point in the year for reflection was really helpful. Using tools to help us do some analysis meant we all felt less reactive'*.

Learning for the future

In our 2019 teaching case, we observed that: 'First and foremost, when Pears engages with a cause it is looking for organisations – and organisational leaders – who demonstrate its values of passion, professionalism, integrity and want the Foundation to become a partner in their efforts. Rooting learning in these relationships means that developing its skills in making and managing relationships is a key priority'.

Since the outbreak of coronavirus, Pears has faced a fundamental challenge to a way of working which sits at the heart of its charitable mission and purpose. It is genuinely concerned about the impact of a long period without opportunities for experiential learning and regular face-to-face contact both externally – with partners and their service users and clients, colleagues across its areas of interest and other funders – and internally, across the team and with trustees: *'We know that this is partly an issue of our own discomfort. We say we want high trust relationships – but we rely on continual dialogue and learning inputs to reinforce the relationship. And that's at the heart of why we find this period so difficult. Of course we can step back for a year and let partners get on with it, but what if the situation lasts longer than that?'*. Despite concerted efforts to compensate and improvise, a key element of the learning system feels missing, affecting confidence to act in 'the Pears way'. Staying true to being authentically relational in their approach through an extended period of remote working feels like a significant challenge.

But there are green shoots to nurture. The crisis is forcing a clear-sighted analysis of how relationships are built and maintained between funders and their funded partners. Pears is beginning to ask searching questions about individual elements of this process, which can be taken too much for granted when operating in familiar territory. It is learning about where and how it best adds value, whether through its organisational development expertise, its role as a critical friend, or simply in the trust and validation inherent in the Pears commitment to *'going on a journey with a project or charity'* through such radically uncertain times. It is seeing much greater

intensity and focus in collaborative work between funders. And it is encouraged that, in some sectors, funders are increasingly ready to contribute to broader conversations as full partners alongside other charities, infrastructure bodies, statutory authorities and communities.

Pears is also tentatively exploring ideas around *'multiplying the channels of communication'*. Although this feels challenging, it does not underestimate the strides that have already been made through digital communication: *'In the last six months, the skill set has increased amazingly'*. Further diversification to enable more of the nuance and variety of contact that builds trust and characterises relationship-based learning is important for the preservation of Pears' own approach. And it may well prove critical in underpinning the stronger collective response that is needed to the vast challenges created – or finally forced front of mind – by the pandemic.