IVAR Institute for Voluntary Action Research

The Characteristics of Responsible Funding

Ben Cairns, IVAR, 6 October 2015, Edinburgh

Work with trusts and foundations

Over the past 15 years IVAR has carried out more than 40 research and evaluation projects for, with and about UK trusts and foundations. The focus of much of this work has been small to medium (£100k to £1m income p.a.) social welfare voluntary and community organisations – organisations working to relieve poverty and disadvantage, tackle injustice, and work for social change. As the organisation marks its fifteenth birthday, we have begun to draw together disparate findings and observations into a commentary about the role and contribution of charitable funders[1]. Our starting point for this exercise has been the phrase 'the age of uncertainty'[2], coined by J K Galbraith in the 1970s to contrast the great certainties of the 19th century with the less self-assured outlook of modern times.

Coming from a world of smaller certainties, voluntary and community sector (VCS) organisations (the primary beneficiaries of foundation funding and support) now find themselves tossed on a whole sea of uncertainties: *'The defining characteristic of this environment is that of continuous 'transition', in which survival means being able to adapt to new and shifting sets of circumstances*'[3]. Handling that is a major challenge for funders and those, like IVAR, who seek to help them. And understanding if, when and how to interact with and support these organisations in ways that help, rather than hinder, them is a central preoccupation for trusts and foundations.

That preoccupation, about how to help rather than hinder, exists within a broader context of change for foundations. The front edge of philanthropic thinking today is calling into question some

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[1] Thanks to Richard Hopgood (Vice Chair, IVAR and former CEO of Henry Smith Charity) and Alison Harker (former IVAR trustee and grants officer for the City Parochial Foundation and Trust for London) for their significant contributions to this paper.

[2] Galbraith, J.K. (1977) *The Age of Uncertainty,* London: Houghton Mifflin.

[3] Institute for Voluntary Action Research (2013) *Turning a corner: Transition in the voluntary sector 2012-2013,* London: IVAR.

common practices of foundation strategy development and execution. This thinking calls for foundations to recognise that many actors and factors interact in unpredictable – and often invisible

– ways to create the problems they seek to address. Rarely can pathways to change be known in advance with certainty; small actions can produce big and unanticipated changes; solutions cannot be imposed; and there is no one right answer.

Several observations are emerging in the field about what this means and how it is different from where the sector has been before[4]. These include, for example:

- *Nature of strategy*. Strategy should be seen more as dynamic, emergent, and adaptive, connected to other strategies and actors and profoundly affected by context, rather than just a series of well-considered, predictable steps that can be captured in a plan that is isolated and relatively independent of others.
- *Role of the foundation*. Rather than the sole owners and orchestrators of strategy, foundations should be strategy participants, one of many players who come to an increasingly aligned understanding of the broader systems in which strategies are situated, and attentive to how their actions affect others.
- *Approach to strategic decision-making.* Decision-making is inevitably decentralised and distributed, with independent actors making their own strategic and tactical decisions, rather than foundations dictating to others via grant requirements and funding streams.

In response to these observations, some UK foundations are designing more decentralised strategies to enable and foster collective solutions and build new ways of interacting among stakeholders[5]. The aim here is for stakeholders to coordinate their work to generate 'systems-level solutions'[6]. While other foundations may not choose to support intentional cross-stakeholder collaboration, many have undergone a shift in mindset about the degree of control that a foundation can or should realistically have when working on complex problems. Whether engaging in explicitly collaborative strategies, or funding a diverse portfolio of organisations which are, broadly speaking, active in social change, it seems that an increasing number of foundations are recognising that they are only one among many independent yet interdependent actors[7]. And that raises questions about their role and contribution.

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[4] See, for example: Patrizi and Thompson (2011); Patrizi et al. (2013); Patton, M.Q. (2011) *Developmental Evaluation: Applying complexity concepts to enhance innovation and use,* New York: Guilford Press; and Kania, J., Kramer, M., and Russell, P. (2014) Strategic philanthropy for a complex world, *Stanford Social Innovation Review (Summer),* 26-37

[5] See, for example: http://www.lankellychase.org.uk/about/what_we_do/mission_and_objectives; http://localtrust.org.uk/assets/images/uploads/Local_Trust_strategy_v9_final.pdf

[6] These strategies include, for example, networks, social movements, multi-stakeholder community change initiatives, social innovation funding, 'collective impact', and other explicitly collaborative strategy designs.

[7] See, for example: http://www.phf.org.uk/wp-content/uploads/2015/06/PHF_Strategy-brochure_singles.pdf; http://esmeefairbairn.org.uk/who-we-are/strategic-plan/

Building on these observations – and turning back to the question of how to help, not hinder – I want to say something about the genesis of the idea of responsible funding, before I move on to discussing six characteristics of this approach.

In 2012 we embarked on a project called Recession Watch. We wanted to provide a snapshot of post-crash life for small and medium social welfare VCS organisations and to consider if and how foundations might respond. We found organisations experiencing a bewildering set of challenges, characterised by complexity (for example, changes to the organisation and funding of public services) and distress (in particular, increasing levels of poverty and hardship amongst their users and beneficiaries). During our visits to 60 organisations across the UK for this study, we saw with our own eyes the incredible work that is being carried out in local areas, often against all the odds, to provide real and tangible benefits to local people. We also heard about the huge importance attached to foundation funding and how, when it works, it can provide a lifeline and make a lasting difference.

For many, the world of foundations is obscure and closed. Despite these concerns not being new, speaking truth to power still appears to be the exception to the rule. Many of the problems and concerns highlighted by our Recession Watch organisations can be linked to shortcomings in relationships. Whilst we recognise that effort and skill is required to make them work, our experience is that improvements are still needed. One of the important conclusions that we reached is that conceiving of the interaction between funders and voluntary organisations as *relational* – rather than contractual – might help to develop trust, foster openness and create a virtuous circle in which both parties are better able to realise their goals. For this to happen, we suggested that funders could be guided by a commitment to making grants a positive experience for grant holders, rather than operating in ways which set people up to fail, or that privilege their own demands and systems over the circumstances and capacity of the organisations and individuals they are trying to reach. We described this commitment as a 'duty of care', and it lies at the heart of what we have termed 'responsible funding'. This means funding that is grounded in the world of grantees, with decisions built around alignment between applicants' aspirations and goals and funders' missions and priorities.

So, drawing on recent published studies for, amongst others, Barrow Cadbury Trust, Northern Rock Foundation and Lloyds Bank Foundation for Northern Ireland[8]; strategic support to, amongst others, Cripplegate Foundation, Harpur Trust and the Tudor Trust; ongoing research and evaluation with, amongst others, Nationwide Foundation, Bank of Scotland Foundation and The Big Lottery Fund; and my own experiences as an independent member of the Comic Relief UK Grants Committee, let me turn to six characteristics of what we have termed 'responsible funding'.

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[8] Institute for Voluntary Action Research (2011) *Beyond money: funding plus in the UK,* London: IVAR; Institute for Voluntary Action Research (2013) *Thinking about core funding,* London: IVAR; Institute for Voluntary Action Research (2014) *A profound and practical difference*, Belfast: Lloyds Bank Foundation for Northern Ireland; Institute for Voluntary Action Research (2014) *Being There*, Gosport: Northern Rock Foundation.

1. Knowledge and context

The 'age of uncertainty', which I referred to earlier, was a redefinition of context, and this is a key issue for funders, with a recognition of the importance of understanding better the context – the ecology, so to speak – in which charities operate. In the sunnier days of the noughties, you could make a reasonable guess about what services might be provided or funded by the public sector and where a charity's services might fit into the picture. You could also factor in services which other charities in the area or sector might provide.

The new austerity has changed that, and old assumptions no longer hold true. So it is important that funders factor in more uncertainty about the context of a charity's work and understand better where the challenges lie. This also means accepting higher levels of risk as a fact of life – charities may lose key funders or partners and have to change what they do (or who they do it with) at relatively short notice.

If it seems relatively uncontroversial to suggest that funders take care to understand the issues that they are trying to tackle and the circumstances of the organisations that they are funding, what does this mean in practice for the range of independent funders active in Scotland? Given the diversity within this group, it seems important to try and draw out some overarching principles. Whilst we continue to see and appreciate the benefits of pluralism in grant-making, we have developed a view through more recent projects about, first, some of the downsides of programmatic approaches with overly pre-determined outcomes.

With increasing calls (from both within and outside the funding community) for trusts and foundations to account for the money they spend, there is a growing movement for them to demonstrate their 'impact'. In addition, funders, as social agents in their own right, also want to be clear about what they are trying to achieve and whether they have been successful.

One response has been for funders to fund 'strategically': designing programmes from the outset with a clear 'impact' or measurable outcome in mind, and delivering them by funding interventions or organisations for which there is existing evidence of achievement. This understanding of strategic funding places a burden and priority on the funder to know (or find out) what and how problems ought to be tackled.

Despite its attractions, such an approach has limitations. The nature of the environment means that not only are organisations evolving, but so are the needs they are trying to address. What might one year look like a sensible 'impact' could – quite soon – not be the case.

Looking across a range of IVAR studies, investment in voluntary organisations (through grants and other assets) seems more likely to succeed when it takes full account of the knowledge and insight of those who are closest to the ultimate beneficiaries and understands their particular contexts best. Not every grant can be assessed with visits and face-to-face meetings, but there is a risk that not understanding needs and context may restrict the potential for a grant to be a mutually beneficial experience. Too often we have seen a profound disconnect between a funder's aspirations and requirements and the state of the field itself – the priorities of a funder may not match or relate to the day-to-day realities of funded organisations.

Second, we have also observed some of the shortcomings of responsive grant-making; in particular, a need even for the lightest touch, open access grant-makers to be clearer about the business they are in and to become a little more informed about the fields that they fund. Apart from anything else, a more careful and considered approach is less likely to result in already stretched organisations wasting time on applications that are doomed to fail.

The point here is not either/or - strategic or responsive. Rather, it suggests the potential value of what has been described as a more 'ambidextrous philanthropy'[9], balancing focused strategies with responsive and opportunistic approaches.

2. Power and mutuality

Over the past decade, the buzzwords of 'transparency' and 'accountability' have been used in many areas, including the voluntary sector, to refine and elaborate processes in order to provide an audit trail for decisions, and sometimes to create a quasi-contractual structure for relationships.

The upping of financial risk since 2008 provided a further reason for funders to consider adding braces to belts so that funds were not misallocated or wasted. Process is, of course, important but many funders are finding that process needs to be adapted to leave more space for relationships, and that relationships of trust and mutual openness may be a better way of managing risk in 'real time'. This is because relationships can enrich knowledge and understanding in dynamic ways which are often beyond written reports against predetermined criteria. So, one question for funders is whether their processes support and give proper space for relationships with grantees – including whether they allow their own staff time to talk and meet and be 'out and about'.

In addition to questions about whether processes allow for relationships with grantees, is the vexed matter of power. Whatever funders and grant-seekers – whether successful or unsuccessful – do together, it is in the context of the inescapable fact that this is, at root, a relationship based around money, in which there is an inbuilt imbalance of power between the two parties. We ignore the power relationship of funder and fundee at our peril. To pretend 'we're all in this together' is patently disingenuous.

But by naming the power imbalance and consciously attempting to reduce it, we can go much of the way towards something akin to partnership. The positive experiences of many organisations that have been involved in IVAR studies since 2000 suggest that the potentially negative influence of the power differential can be offset if both parties are aware of this from the outset, and if the more powerful party – the funder – does whatever it can to mitigate the worst effects of the imbalance. So, what does it require for a foundation to set aside its obvious power advantage and develop mutually supportive relationships with grantees? I would point to four critical factors.

First: an explicit recognition that the power relationship is asymmetrical, allied with a deep commitment to behaving responsibly: this is as much an organisational value as it is a practice. Second: having a shared vision or goal with those you fund and making sure they have a role in the

[9] Connelly, P. (2011) The best of the humanistic and technocratic: Why philanthropy requires a balance, *The Foundation Review*, 3, 121-137.

shaping of what *you* do, if you expect to have a role in shaping what *they* do. Third: a concentrated focus on being responsive and useful; to be helpful, rather than interfering. Fourth: a significant investment of internal resources – people with authority, enthusiasm, commitment and, critically, emotional intelligence – to engage directly with grantees.

Above all, I think our work with foundations has highlighted that there is potential, through the combination of a funder's investment and an organisation's activities, for the two parties involved to create a kind of *exchange*. When there is space to foster openness and develop trust, we have observed a virtuous circle in which both organisations are better able to realise their goals. It seems to us that, during a period of such heightened uncertainty, this kind of symbiosis in funding relationships has real value. In this way, we might begin to move from subordination to reciprocity.

3. Flexible funding

A critical part of the relationship between funder and grantee is how funding is delivered. In a time of uncertainty, when the external environment can throw up so many unexpected and unplanned-for changes, core (unrestricted) funding has a special value in giving a measure of flexibility as to how funds can be used. Grantees also value an approach which recognises their whole organisation and work, and not just a particular strand. For many funders, this is a natural part of how they fund, and some have extended this to provide additional flexibility by allowing grantees to carry funds over and, in some cases, alter the timing and amounts of funding to reflect changing circumstances.

Project funding will always have its place, but trusts and foundations need to consider now more than ever whether their funding for particular organisations is best framed as project or core funding. IVAR has worked hard over the years to show the value of core funding, especially for smaller charities. During 2013/14 we developed our thinking further with the publication of *Thinking about Core Funding.* This took the debate to another level and explored the concept of 'flexible funding', which extends beyond core/project grants to cover duration, terms and conditions, funding plus and repeat funding.

In looking back at the findings from our evaluation of Lloyds Bank Foundation for Northern Ireland's pioneering Creating Change Programme – six year core funding plus capacity building support – we have been struck by the repeated references to 'flexibility' and its importance to the process and outcomes of grants. Flexibility in relation to plans. Flexibility around expectations, allowing organisations to develop and evolve independently. Flexibility around duration of funding: the kind of complex challenges being tackled by many social welfare organisations legitimately require more extended investment than traditional three-year funding agreements. Flexibility through blended packages of investment: funding, additional support and engaged relationships.

The message carried by this flexible funding model is this: consider the most appropriate kind of funding and process to achieve your desired aims; be open to long-term and/or core funding; understand that achieving change takes time (particularly on complex social issues); allow the 'how' to change during a grant term; and be open to the possible need for additional support to help make things happen.

And turning to the work we carried out in reviewing Northern Rock Foundation's approach to grant-making, the practice of 'focusing on the problem' and, linked to that, the commitment to 'managing risk through relationships not systems' feels significant. Our observation is that this meant that programme managers were not constrained by an arbitrary set of rules around, for example, duration of funding or reporting requirements. Differentiated arrangements were put in place according to what seemed most appropriate in relation to the problem being tackled or task being undertaken, with the emphasis on letting organisations set their own objectives, not imposing objectives on them.

Other funders might want to consider the possible benefits of being less encumbered by unnecessary and restrictive rules and, linked to this, how they can create the space for more engaged relationships with grantees and a more flexible approach to funding. Approaches which frame relationships primarily within terms of administrative process and 'outcomes promised and delivered' may be inherently riskier and less productive than relationships based on knowledge and trust in a progressively more unstable climate. And more flexible funding seems much more likely to help grantees manage the unexpected than restricted

4. Funding plus

For many foundations, the idea of flexibility extends to the deployment of other assets, in addition to grants, in pursuit of their mission and the goals of their grantees. This is what has come to be described as 'funding plus' (or 'funder plus', 'grants plus').

In 2011, we launched *Beyond Money* in which we used the term 'funding plus' to describe 'any activity which is additional to a grant and the grant making process'. This description – arrived at following over 100 interviews with funders, grantees and consultants across the UK – meant that we were also saying that all stages of the practice of *making grants*, however engaged and sophisticated, fell outside the broad tent of funding plus.

At a recent ACF workshop on 'funding plus' I was interested to hear one of the funders present say that they now felt relaxed about the prospect of 'just giving grants'. Was this a case of heightened self-awareness or just a lack of creative thinking about what is possible with independent money? My own view is that there may be very sound arguments for some funders to resist the zeitgeist – funding plus, social investment, fewer bigger grants – in favour of apparently old-fashioned grants. However, it would seem reasonable to expect all funders to engage in debate and discussion about the use of their assets as part of a wider consideration of what it means to be a responsible funder.

My own thinking has begun to deviate a little from the arguments we put forward in *Beyond Money*. This is, in part, as a result of a conversation with Anthony Tomei, then Chief Executive of the Nuffield Foundation. Anthony's argument was, in essence, that the moment you conceive of trusts and foundations as being more than just grant-makers, our description begins to look inadequate. He and his colleagues were actively and directly engaged in processes and relationships that went 'beyond money', both upstream and downstream of the work that they funded. For Nuffield, this wasn't 'additional' activity – it was integral to, and indistinguishable from, how they made grants. This was mirrored for us recently in our work with The Barrow Cadbury Trust, where we concluded that the term 'funding plus' did not adequately describe their approach, as the distinction between 'funding' and 'plus' is consciously and deliberately blurred. We described it instead as 'high engagement funding, a term that better reflects the phenomenon than "grants plus" or "funding plus", which imply a simple "add on" to basic monetary transfers'[10].

My observation would be that this degree of engagement – where going beyond the money may be automatic and is an expression of values and beliefs – is still relatively rare. Indeed, at the other end of the spectrum, going beyond the money might just not be the right thing. And there's no shame in that.

For those that are interested or able to go beyond the money, we can identify a number of critical success factors from our earlier work with, amongst others, City Bridge Trust, Lloyds Bank Foundation for England and Wales, and The Tudor Trust:

- In order to inform thinking about the focus and method of additional support, funders need to think about its purpose. In particular, is it to strengthen individuals, projects or organisations, or a combination of all three?
- Interventions designed to support the stability and sustainability of smaller organisations need to be bespoke and not prescriptive in either aims or content. In a context of uncertainty and change, off the shelf 'toolkits' or online solutions are likely to be of only limited use. Instead, organisations benefit most from flexible, tailored support that they can access when needed. This has implications for processes for identifying and agreeing topics to organise support around.
- There is a strong case for arguing that it might be most beneficial to focus support on forward thinking and planning, with a particular emphasis on mission review and renewal. We have found elsewhere that organisations that are able to adapt and develop are those which review and renew their mission in a changing environment. Organisations that seem to understand their mission best are those that are strongly rooted – with a clear sense of where and how they fit into the greater scheme of things.
- The distinctive nature of smaller organisations is such that the delivery of support may best be carried out by people with experience of organisational development work in such organisations and a clear understanding of their role, accountability, and reporting relationship with both funder and grantee.
- Given that the implementation of change can be complex and stressful, support might need to be offered over a period of time to allow for learning and adjustment, as appropriate.
- Finally, and critically, foundations need to pay serious attention to some of the ethical dilemmas posed by extending involvement in grantee organisations beyond the provision of funding. In particular: What is your mandate? What are the limitations of your role? How best to use your power ('power to' not 'power over') for good? How best to deploy resources and guard against seeking gratification or profile over social impact?

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[10] Cairns, B and Buckley, E. (2012) 'New ways of giving', Paper presented to the *ISTR Conference*, Siena, Italy.

5. Attitudes to 'sustainability'

Before I conclude this overview of characteristics of responsible funding with a discussion about 'strategic learning', I want to turn briefly to the question of 'sustainability'.

Funders have become more exercised by considerations of sustainability (and, often by association, resilience), even if they don't necessarily use this language, since the onset of the New Austerity. This is because they don't want to fund organisations which fail in mid-grant, and they don't want beneficiaries to suffer through such failures. In work that we have been carrying out for a new publication, *Thinking about Sustainability*, our conversations with a range of UK funders have shown that, for many, the primary issue is the sustainability of the work and an organisation's place within the local economy and ecology, and organisational considerations are simply part of assessing the strength and resilience of delivery.

What makes the sustainability of the work so difficult to judge is the rapidly changing context. For example, one funder commented that sustainability is not a journey but a state of being, which can change very quickly. Another wondered whether funders need to have a different kind of conversation with applicants and grantees, looking more closely at how they think about their future, their role in the local economy and environment and how these might fit.

Organisations on the ground spoke to us of the instability which flowed from the lack of core cost funding; the pressures of cuts and contracts; and the tendency of funders to focus on fashionable solutions without regard to the intense pressures on management, and put more emphasis on organisational considerations than the quality of work in their assessment procedures.

Our initial conclusion from these various conversations is that we think there are valuable lessons to be learned for funders in how to assess, relate and fund in ways which are supportive and flexible and which focus on what enables organisations to do good work in a fast changing context.

6. Strategic learning

Finally, I want to turn to the idea of 'strategic learning'. Let me begin with a brief explanation of terms. Strategic learning is the use of data and insights from a variety of information-gathering approaches – including evaluation – to inform decision-making about strategy. Strategic learning occurs when organisations or groups integrate data and evaluative thinking into their work, and then adapt their strategies in response to what they learn. Strategic learning makes intelligence gathering and evaluation a part of a strategy's development and implementation – embedding them so that they influence the process.

From our recent survey for the Evaluation Roundtable of 34 larger UK foundations (those giving more than £1m per annum) we found that respondents were very clear about what it means to be a 'learning organisation': actively creating spaces and opportunities for knowledge and intelligence to inform and shape day-to-day practices, as well as future direction, and embedding these within organisational culture.

But - and this is the main point I want to make in relation to strategic learning - we also found that there are significant obstacles to walking the learning walk.

First, 85% of survey respondents stated that getting good data and the right mix of data was a challenge. In addition, just under half feel that they do not have appropriate internal systems that enable data to be collected, and over a third feel they lack the skills and/or capacity to analyse data.

Second, while respondents reported a fairly high level of support for using evaluation for strategic learning, both from trustees and senior management, 45% said that they are not content with the way their organisation currently makes use of evaluative information. And although 50% felt that their organisation's use of evaluation findings to fund various areas of their work was either 'good' or 'acceptable', only 18% agreed that they have effective mechanisms for disseminating learning across the organisation. The majority of respondents feel that too little is invested in knowledge management and formal learning functions. Reasons for these mixed feelings about how trusts and foundations are currently making use of evaluative information include a lack of time and space to reflect on evaluation findings, as well as the absence of systems and procedures to capture and share knowledge.

Third, suggestions for how to overcome some of these challenges and make learning more useable, useful and strategic, include:

- Think about learning as dynamic rather than linear and static, and not just a 'point in time'. Here there is a need to use learning in real time and remain flexible about how data is drawn on and used to support a more dynamic process.
- Support time for reflection. We heard a lot about the need for time to engage with data and learning. Specifically, if learning is to be a priority then other areas of work may need to be reduced accordingly.
- Prioritise the evaluation activities that matter most to your trust or foundation, and focus on maximising and becoming really skilled at them. Avoid the temptation to add more and more evaluation-related activities (e.g. evaluations at multiple levels, performance management systems and dashboards, grantee and stakeholder assessments) until you are satisfied that you are obtaining as much as you can from the activities you already have underway.

Finally, recognise that this is, in part, a question about governance. Governance systems are often at odds with a learning approach. The processes and mechanisms through which trustees are involved in data and learning is often felt to hamper their ability to effectively engage. Primarily, this is because trustee meetings are structured in a way that prevents deep or reflective engagement with data and learning. And trustee capacity and interest can be an issue.

Background

Introduction to IVAR

IVAR (the Institute for Voluntary Action Research) is an independent charitable research institute founded in 2000, affiliated to Birkbeck, University of London.

We aim to:

- *Strengthen the ability of smaller voluntary, community and social enterprise (VCSE) organisations to adapt and change while staying independent and true to their missions.*
- *Facilitate a shift to more productive and collaborative relationships between funders, public bodies and VCSE organisations.*
- *Support learning about and within trusts and foundations and public agencies.*

We specialise in practically useful action research, evaluation, learning and support in the VCSE sectors; we also facilitate relationship building between VCSE organisations, public agencies and funders. We are interested, motivated and inspired by the work of groups and organisations working to tackle disadvantage and promote social justice across the four countries of the UK. We have found that organisations that are active in social change work and receptive to IVAR's offer tend to be small to medium (income of between £100k and c. £1m). These are organisations increasingly under pressure from reduced funding based on larger risk contracts; increased scrutiny; out-sourcing based on outcomes; localism; and a dearth of skills, experience and capacity to respond. Everything we do is done in order to ensure that VCSE organisations make better sense of the challenges and options facing them.

And we receive core funding from Esmée Fairbairn Foundation, LankellyChase Foundation and the Tudor Trust in order to act as a critical friend and information resource for trusts and foundations.

Impact of our work

Since 2000, we have carried out almost 200 research, evaluation and advisory projects, ranging from large-scale national programmes to work with individual, grassroots organisations. The impact of our work has been to build knowledge and understanding, as well as shift policy and practice, in a number of key areas, for example:

- **Voluntary sector mergers** – through the publication of *Thinking about merger*, the delivery of information and learning workshops to hundreds of VCSE sector practitioners, and advice and support to central government and the Charity Commission.
- **Cross-sector partnership working in health and social care** – through the adoption and implementation of new, integrated systems for the design, commissioning and delivery of frontline services.
- **Grant-making** – through the publication of *Duty of Care* and *Thinking about Core Funding* and the emerging focus on 'flexible funding' arrangements for frontline VCSE organisations.
- **'Funding plus' practices** – through the publication of *Beyond money*, the delivery of workshops to grants staff and the widespread adoption of key findings across UK trusts and foundations.

- **Strategic learning** – through a UK Evaluation Roundtable and the development of new and different approaches to the design and utilisation of evaluation and learning within trusts and foundations.

Our research approach is made possible by our flexible team of just six core staff, eight trustees and a network of 15 associates and advisers, all of whom have worked in and around the VCSE sector.