

Embedding direct experience into applications and assessments

*Joseph Rowntree Housing Trust
case study*

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With thanks:



Joseph Rowntree Housing Trust

Engaging people with lived experience in grant-making

About

The Joseph Rowntree Housing Trust (JRHT) is a registered housing association and care provider in York and north-east England. JRHT and sister organisation Joseph Rowntree Foundation (JRF) share a vision of a prosperous, poverty-free UK.

JRHT makes about 20-25 grants a year in the city of York to local voluntary and community organisations working to develop solutions or routes out of poverty for local people. Grants typically range between a few hundred pounds and £10,000, averaging around £5,000. JRHT's processes are built around developing open and trusting relationships with applicants and grantees.

JRHT application process

Since 2017, JRHT has included people with lived experience of poverty in their grant-making process. The driver for engagement was the publication by JRF of '[We Can Solve Poverty](#)', which recognised the importance of involving people with direct experience. It coincided with the Poverty Truth Movement, fully supported by JRF, which aims to educate those in power about life in poverty and to bring them together with people in poverty to work side-by-side as equal commissioners.

This led JRHT to form an advisory group of people with lived experience to support and feed into the York grants committee. The advisory group looks at a number of grant applications in the form of a short summary prepared by JRHT staff. The group uses four questions to assess applications:

- Is it going to work?
- Will it make a difference?
- What's good about the application?
- What concerns or questions do they have about the application?

Any issues raised by the advisory group are then picked up and explored in a staff assessment before the bid goes to the grants committee for final decision.

Recruitment and training of the advisory group

JRHT felt it would be more effective to build on existing relationships than hold an open recruitment process for the advisory group. Staff contacted previously funded organisations to see if they knew of people who might be interested in the opportunity to help JRHT decide which grants to fund.

This process – of exploration and conversation – took some time but JRHT wanted to get it right. JRHT explained up front that grant decisions were currently made by professionals whose lives significantly contrasted with those they were seeking to help and that this is what they wanted to change.

JRHT looked for people who were:

- At a point in their journey where they could step aside a little from their day-to-day experience, rather than in the midst of personal crisis
- Connected to the organisations supported by JRHT and its mission to solve poverty, but not necessarily need to identify themselves as having direct lived experience of poverty.

Through this process they established an advisory group with five members. JRHT then explored the grant application process with the group, asking what they wanted to spend their time talking about and where they could add most value. The group was most interested in contributing to questions about the proposed work, where it would take place, who would benefit, and what the money would achieve if the grant was awarded.

An advisory group member explains:

‘There were 5 of us – all very different experiences but all who could input a side of life that I don’t think you get very often get in funding. We had a refugee, a care worker, myself - who was unemployed - and then a stay at home dad. That’s what’s so good – we all know the area and have different experiences that we can bring to the discussions.’

Why take this approach

‘A big value of engaging people with lived experience is that we hear things we wouldn’t otherwise hear, which could quite legitimately have just disappeared without their input’

‘People who apply for our grants appreciate that there is some input from people with lived experience. By having that involvement, we have an extra layer of scrutiny and that’s seen as a positive thing to applicants’

The York grants committee and advisory group have different but complementary skills sets. The grants committee includes executive officers, senior council officers and a university professor, all well used to articulating their views and confident about working in structured environments and dealing with finances and governance.

While the advisory group brings experience and knowledge of life as it is lived by those experiencing poverty.

Since establishment, the advisory group's influence on JRHT decision-making has grown. The group has helped shift thinking by providing insights into what is happening on the ground and have, on occasion, raised issues that need addressing before the application can proceed. For example:

1. Questioning the location of a working men's club for delivery of family work in one application. Group members knew the venue and were unsure about its suitability for children.
2. Pointing out that an application to take children from the city on a boat trip at sea could trigger previous trauma for refugee children, as noted by an asylum seeker member of the advisory group.

Opportunities and challenges

Once a year the two groups come together for reflection. Getting the design and focus of these sessions right has been challenging. At the beginning, the committee dominated the discussions, so JRHT had to think carefully about how to hold conversations, including where people sat and with whom. This was particularly challenging during Covid-19 when meetings had to go online.

However, the two groups have a strong desire to work more closely together, including through social opportunities. Both are keen to learn more about each other's respective work, including attending community events, and meeting funded groups together.

As one advisory board member said:

'The relationship with the Committee feels respectful now... I think they do see us as bringing a useful perspective on things that they would never be able to know about because they don't know the area like we do, I feel we are taken seriously and listened to, but it's taken a while. At the beginning I wasn't sure.'

Evolving roles

JRHT are committed at Board level to being more ambitious about lived experience and participation, including within grant-making processes. It also forms part of a strategic review being undertaken by Joseph Rowntree Foundation.

They are exploring how to push themselves further, including considering using the current grants committee (of professional representatives) as advisers and have the lived experience group make grant decisions. They are keen to maximise the benefits of the lived experience group but recognise this needs to be done sensitively.

JRHT want to ensure that advisory group members continue to get the experience they desire and involvement doesn't overburden already busy lives. As the advisory group's life circumstances change, practical matters arise such as timings of meetings. Initially, the group was mainly unemployed and able to meet on weekdays during school hours, but now most members have jobs and this no longer works.

Moving to a decision making role would require advisory group members to look at governance and finance, this may not be what the group wants and would make their job more time-consuming and complicated.

JRHT would also need to attend to the shift in power dynamics that would come from the grants committee becoming advisory and the advisory group changing to a decision making body. For example:

- Would advice from grant committee members be seen to hold more power and sway, given the previous set-up (where the committee dealt with technical matters)?
- If JRHT were to combine the two groups as one committee, would the voices of the advisory group risk being lost?

Learning elsewhere suggests that high-quality facilitation of a combined committee would be essential, such as that practised by the Poverty Truth Movement which starts with structured listening and then builds into dialogue.

Learning on how to engage people with lived experience

- Getting the advisory group right takes time and effort. It requires committing time to talk to people properly and investing in relationships: *'getting the dynamic right to create the right interaction is vital'*. This includes seemingly small things like preparing for meetings, for example, *'do we want to do a PowerPoint or should we just print off bits of paper and chat it through?'*
- Use relationships to seek out possible participants, and don't talk directly about looking for people with 'lived experience'.
- Accept that it is an ongoing process, be open to learning from others and adapting your practice as you go.
- Think carefully about language: a thoughtless slip into jargon can have devastating consequences of exclusion and put back progress.
- Grant making concepts will be unfamiliar, so look for creative ways of breaking it down so people can see where they can add value.
- Stress test different ideas around power, inclusion and being heard.
- Have fun! Grant-making is quite a serious business, and some light relief and social events can break down a lot of barriers.

Open and trusting grantmaking

We are calling for funders to adopt more open and trusting practices that make life easier for those they fund. We want funders to make grants in a way that reflects the realities facing charities now and for the foreseeable future.

We worked with charities and funders to design eight commitments to managing grants and relationships in a way that reflects funders' confidence in and respect for the organisations they fund.

Over 100 grantmakers have signed up to our eight commitments to funding charities in an open and trusting way. We hold regular meetings for people to reflect on and develop their practice, and are working on a way for charities to hold open and trusting grantmakers to account.

Find out more about the open and trusting grant-making initiative and how to join our community of open, trusting and flexible funders at: www.ivar.org.uk/flexible-funders

Authorship and acknowledgements

This case study has been written by Gilly Green and Eliza Buckley, based on the research of the authors and researchers: Liz Firth, Keeva Rooney and Folasade Akintola. The insights from this case study contributed to the '[Lets charities shine](#)' report which explores guiding principles for more open and trusting funding applications and assessments.

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