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**Yorkshire Funders Conference**

**19th June 2024**

**Sheffield Hallam University**

**See conference short video** [**here**](https://youtu.be/JpqTiXvxn6s?feature=shared)

**Andy Cook, Chief Executive, Centre for Social Justice**

**Keynote speech**

Andy introduced the [Centre for Social Justice](https://www.centreforsocialjustice.org.uk/) – a think tank with a focus on poverty and addressing the root causes of poverty. CSJ is particularly interested in these issues:

* Family breakdown
* Educational failure
* Worklessness
* Addiction
* Problem debt & housing
* Criminal justice
* Modern slavery

He described the CSJ’s vision is for those living in the poorest and most disadvantaged communities across Britain to be given every opportunity to flourish and reach their full potential. In his words, “CSJ connects the back streets to the corridors of power.”

CSJ aims to bring this vision to life by seeking to influence the policies the Government creates and the laws it makes, such that it does all it can to address the root causes of poverty. Through their partnership with the CSJ Foundation, the CSJ work with almost 400 grassroot charities from Britain’s poorest communities to bring to life their critical experience and expertise of addressing poverty, and supporting the most vulnerable people and communities.

They also work with experts across the UK and worldwide to develop ambitious, evidence-based, and experience-led reforms that tackle the root causes of poverty and social breakdown. They use their insights to work closely with an extensive network of political, policy and media contacts to campaign for their successful implementation. He described how this can work, even if it takes years, by citing the example of insights from a Leeds charity that raised the issue of cuckooing. From this insight, CSJ managed to get it included as an offence in a recent government bill on Modern Slavery. See [here](https://www.centreforsocialjustice.org.uk/library/cuckooing-the-case-for-strengthening-the-law-against-slavery-in-the-home) for details of the CSJ report.

The main content of his speech was to describe the two nations of the UK eloquently and passionately, using three images to summarise the state of the UK:

* Petrol – lockdown poured petrol on the flames of existing systems. Andy’s slides evidenced the impact of Covid and lockdown on school absence and particularly persistent absence.
* Elephants – how some uncomfortable issues were not surfaced – “the elephants in the room”. As examples he evidenced that issues like boys' poor mental health, the impact of the benefit system on people’s motivation to work, medicalisation of issues that were once dealt with through community and the failure of interventions such as methadone to address addiction.
* Playing Fields – and the uneven playing field that small charities face in addressing the issues. Here he referenced the recent CSJ report “Underfunded and Overlooked” which reported that funding for charities is weighted toward larger charities.

Andy concluded by being optimistic about certain levers for change. These were:

* With any future government having to address major financial challenges, he felt that the government would be “out of the way” and that would allow charities and others to focus on these issues.
* Charities needed to be listened to as the “canaries in the mine” - being the people closest to issues and their insights needed to be heard.
* The structural changes that meant there was the devolution of power to regions, the interest in philanthropy to make interventions and the ability of organisations like Yorkshire Funders to create the infrastructure for change.

See [here](https://www.yorkshirefunders.org.uk/wp-content/uploads/2024/06/Yorkshire-Funders-Forum-CSJ-presentation.pdf) for the slides from the conference.

**Anand Shukla, Chief Executive, Henry Smith Charity**

**Keynote speech**

**Anand described his wealth of charity experience before joining Henry Smith Charity (HSC) in 2023. He then went on to describe how this charity, founded in 1628, is approaching a major review of its grants strategy.**

1. **The** [**Henry Smith Charity**](https://www.henrysmithcharity.org.uk/) **context**

* One of UK’s largest grant giving foundations which distributes over £50m per year.
* The founder’s will commits HSC to support people in need – and that generalist approach is reflected in the way in which we currently work – an open and responsive funder of service delivery charities over a very broad range of cause areas – Children and Young People, older people, Information, Advice and Guidance, refugees and asylum seekers, LGBT, victims of domestic and sexual abuse, women’s and girls organisations and so on. It’s easier to say what we don’t fund rather than what we do.
* In short, what our main grants programmes look to do is reduce social and economic disadvantage by providing long-term funding to charities working to bring about lasting change to people’s lives.
* Also run a number of smaller, specialist programmes related to the settlor’s wishes.

1. **WHY CHANGE?**

* HSC were at the end of a strategy period (one year into it).
* General sense was that HSC did a number of things well – core cost funding for the long term was the key thing that came up time and again.
* However, there was a general sense that as a £50m organisation, we were not punching at our weight – the phrase ‘sleeping giant’ came up unprompted in many different quarters.
* We tend to focus on symptoms, not causes.
* There was a desire to intervene earlier, upstream.
* These views broadly shared at staff and trustee level.

1. **KEY STRATEGIC CONSIDERATIONS**

* So where do you begin in strategy thinking in an organisation of such complexity and potential? And also where you have greater discretion than in any other context I have worked in – an independently wealthy organisation which does not have to worry about the requirements of its funders, and where the mission is very general – helping people in need.
* So, as I said earlier – I started with desired impact – the central question – where do we add most value as a UK-wide foundation?
* The obvious answer to that question is money.
* But then – where else do we add value as a foundation seeking to create lasting positive impact? And essentially the strategy process at HSC over the last 18 months has been answering that question.

1. **WHERE HAVE WE GOT TO – AND WHAT’S NEXT**

* Important trustee meeting early June 2024 on the strategy – and I am pleased to say that the board has signed off the direction of travel.
* The central areas are as follows:-
* To maximise long-term impact, we have taken the view that we have to work on a smaller number of funding priority areas.
* Core cost funding for service delivery organisations is incredibly important and will continue to be at the heart of our model – but that shouldn’t be the only impact lever. The new HSC operating model will also support organisations working to improve systems and create policy change. It’s that point from earlier – intervening earlier, upstream, addressing symptoms not causes.
* Non-financial assistance – funder plus in the foundation jargon – my social impact objectives as a CEO of a foundation are all met by the organisations we support. I don’t do any of that myself. It is therefore in HSC’s interests that the impact and effectiveness of the organisations we support is as strong as possible – that will mean a range of areas of support including leadership, DEI, governance, infrastructure, fundraising, communication, digital etc. We will fund management and leadership development programmes, with a particular emphasis on improving diversity. We will use our convening power in the sectors we work in and will organise learning exchanges giving civil society leaders and managers the time and space to connect with each other. This activity will not be mandated for organisations we fund, but time and again in our consultation with the sector, these type of connection and learning events were valued and requested.
* A more relational way of working – this is going to be the biggest single cultural shift for HSC. Because we work as an open funder across such a wide range of areas, we simply cannot work as relationally as we would like. We cannot get to know the organisations we support as well as we would like to, and build close, supportive relationships.
* The final key area is being more closely connected with the communities we support – we are a UK-wide funder working in every nation and region of the UK. But as an organisation with a team of 44 people, our understanding of the nature and context of communities is inherently limited. So, we will build a network of community, specialist and regional foundations helping us to identify high-performing and high-potential organisations and leaders across the UK and in helping to convene discussions between organisations and stakeholders in their communities.
* We are now moving from strategy development into business planning and implementation mode. We announced the closure of our current main grants programmes at the end of May, and the final date for applications is the end of June.
* These are big changes for HSC. The new strategy will require very different ways of working – a relational approach to grantmaking; a wider use of non-grantmaking levers to achieve impact; collaborative working; a commitment to open philanthropy and shared learning.

**Panel discussion**

Chaired by David Warner, Trustee of Yorkshire Funders and Chair of Local Trust.

Panel members: Ruth Willis, Chief Executive of South Yorkshire’s Community Foundation, Steph Taylor, Chief Executive of Give Bradford/Leeds Community Foundation and James Banks, Chief Executive of London Funders.

The panel had a wide-ranging debate about the funding world. Key points that arose:

* Open and trusting grantmaking (i.e., core cost funding and multi-year grants) is more apparent than five years ago but still more to do.
* The impact of Covid when funders were more collaborative still exists, but that spirit is not as energised and the pace of change and collaboration has slowed. How do we recognise that we are surrounded with similar challenges to cost of living and Covid but we aren’t responding in the same way – for example two women killed a week because of domestic abuse – why is this not a crisis for funders to address?
* Devolution is an opportunity for charities and the funding sector to work better with local government.
* Some regional mayors are beginning to see philanthropy as a significant opportunity.
* The impact of austerity and the cost-of-living crisis is still having a disproportionate impact on certain communities and levelling up does not seem to be working.
* Charitable organisations are feeling the brunt of austerity – having to do more for less, but because the smallest charities are often the “last door” for people in crisis, these charities are facing rising demand when funding is reducing.
* Examples of positive initiatives included [One for the City](https://oneforthecity.org/) – Leeds SMEs committing to long term support to communities, London Funders new [Collaboration Circle](https://londonfunders.org.uk/what-we-do/enabling-funder-collaboration/collaboration-circle) where funders can come together to pool funds and people to work differently.
* There were calls for greater collaboration in Yorkshire with ideas to find and fund the gaps, especially right now when we are facing challenges in our communities.

**Presentations from 2024 Conference workshops can be found here** [**https://www.yorkshirefunders.org.uk/resources/resources-from-events/**](https://www.yorkshirefunders.org.uk/resources/resources-from-events/)

**Climate Justice & Grantmaking**

**Led by Jane Cabutti, Growing Philanthropy Director, Environmental Funders Network**

* Climate change and nature loss affect every other social cause, and they affect the most marginalised in society first and worst. This is therefore a justice issue as these communities are the least responsible for greenhouse gas emissions and nature loss.
* We discussed the barriers to starting to give to climate and nature causes: it can feel overwhelming; staff and trustees often do not feel that they have enough knowledge and expertise; and there can be questions about the impact funding can have in the face of such challenges.
* However, there is support to overcome each of these barriers! Lots of organisations and resources to help with the sense of overwhelm and to grow knowledge and expertise, and a lot of evidence now about the impact of environmental funding, of whatever size (e.g. see [Stories to Inspire](https://www.greenfunders.org/wp-content/uploads/2020/11/Environmental-Philanthropy_Stories-to-Inspire.pdf)).
* The [Funder Commitment on Climate Change](https://fundercommitmentclimatechange.org/), hosted by ACF, is a great place to start. Also see the links and resources in Jane’s [presentation](https://www.yorkshirefunders.org.uk/wp-content/uploads/2024/06/Climate-Justice-workshop-YF-June-24.pdf) and don’t hesitate to contact [jane@greenfunders.org](mailto:jane@greenfunders.org) for any help, advice, connections etc.
* The main message is: start taking action now – it will have much greater impact than in years to come.

**Embracing new Technologies**

**Led by Ian Bate, Founder/Director of Issmio as Gemma Bull was unable to attend**

* Vital to do your research to understand more:
  + <https://www.bbc.co.uk/sounds/play/m00208g4> - the environmental impact of AI
  + "The Modern Grantmaker: A Guide for Funders Who Believe Better is Possible" Gemma Bull and Tom Steinberg <https://moderngrantmaking.com>
  + <https://datakind.org>   
    - Especially their webinar series which is all on YouTube  
    - Their playbook for implementing AI projects
  + Charity Commission blog  
    <https://charitycommission.blog.gov.uk/2024/04/02/charities-and-artificial-intelligence/>
  + Get your own ChatGPT  
    <https://chatgpt.com/>
  + For fun<https://openai.com/index/sora/>

**How to Manage Demand from the Frontline… Aiming for the Impossible**

**Led by Clare Cannock, Head of Grants, Henry Smith Charity**

* Be intentional and focus or prioritising what you want to fund, develop your prioritisation toolbox.
* Consider how common bias held by individuals could shape your decisions and introduce ways to manage bias.
* Be open and transparent, making sure that your communication is clear so that applicants know what you want to fund or how you prioritise.
* Consider how engaging people with lived experience can support your decision making at strategic development level, programme design level and grant decision making level.

**Independent Funders Working with the Public Sector**

**Led by Emily Dyson-Hawkes, Deputy Director, IVAR (Institute of Voluntary Action Research)**

* There was a general view that local authorities and other agencies are more open about engaging with and having dialogue with smaller funders to support local communities. This includes being more flexible in how funds are distributed and what monitoring requirements are necessary. There has to be a shift towards open and honest grantmaking.
* There is more than one approach to collaboration between public sector and independent funders. This may include funds being given directly to independent funders to distribute or to sharing of data to improve targeting of resources.
* Independent funders shouldn't be worried about pooling funds with councils - we are all in it to do the best we can together, for people, and communities in a specific place. For example, Prosper cares about improving lives in Wakefield, and not about the 'glory' or the publicity around their grants. Some delegates were worried about their reputation if they pooled money with a local authority.
* It would be useful to have a strategic overview of funding within each local authority area.

**New Grantmakers Network**

**Led by Imogen Graham, Yorkshire Funders’ trustee & Charity Grants Manager at Leeds Building Society Foundation & Steph Taylor, Chief Executive, Leeds Community Foundation**

* Ideas for Yorkshire Funders/the network to take forward
  + A mentoring scheme to match new grant funder staff and volunteers with experienced grant makers
  + A scheme to share key data across the network
  + A directory of funders across each region and who they fund
  + An ‘opportunities to donate’ spreadsheet for unsuccessful applications other funders may wish to fund (similar spreadsheet created by EFN)
  + Workshop on funding alternatives to registered charities (CICs etc)
  + An opportunity for funders to jointly commission research
* Resources recommended in the network
  + Organisations with resources/training/networks
    - Yorkshire Funders
    - Environmental Funders Network
    - Green Funders
    - IVAR
    - Association of Charitable Foundation
  + Reports/stats to explore
    - Local Joint Strategic Needs Assessments (JNSA)
    - APPG Children In Care Report
    - End Child Poverty Stats
  + Books/podcasts
    - Philanthropisms podcast
    - Modern Grantmaking: A Guide for funders who believe better is possible
  + Resources for improving grant making practice
    - 360 Giving
    - Grantadvisors.co.uk (trip advisor for grant seekers where they can anonymously give feedback on your processes and practices)
    - IVAR Flexible Funders- 8 commitments

**Understanding Your Grantmaking Area’s Needs when it comes to Geographics & Demographics**

**Led by Children in Need’s Senior Data Analyst, Shaun Simmons, and** **Impact Manager – the North region, Gemma Brookes**

* Request for Yorkshire Funders to run a Desk-top Research training workshop run by Shaun at Wrigleys Solicitors in Leeds.
* Yorkshire Funders will aim to add this to the 2024/25 event calendar – likely to be Q1 of 2025.

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