



Being relational, being collaborative

(A Family Funder's Perspective on:

- Making grant-giving simple
- Spending down
- Collaborating with other funders)

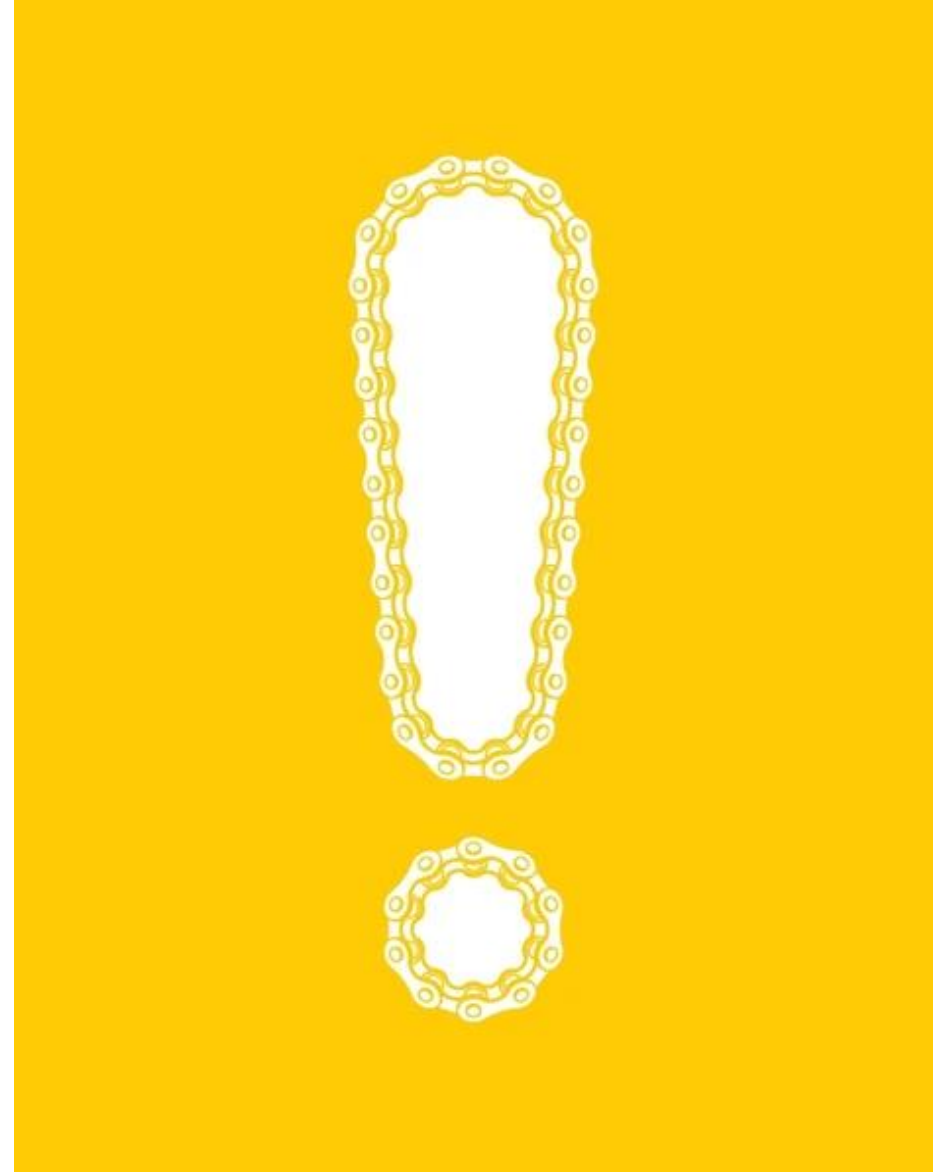
Andrew Ballinger
Trustee



First things
first.....

A CAVEAT

(or two)



Supporting

Young People



We award grants to organisations supporting children and young people (aged 0 to 19 / 25 SEN) throughout the North-East.

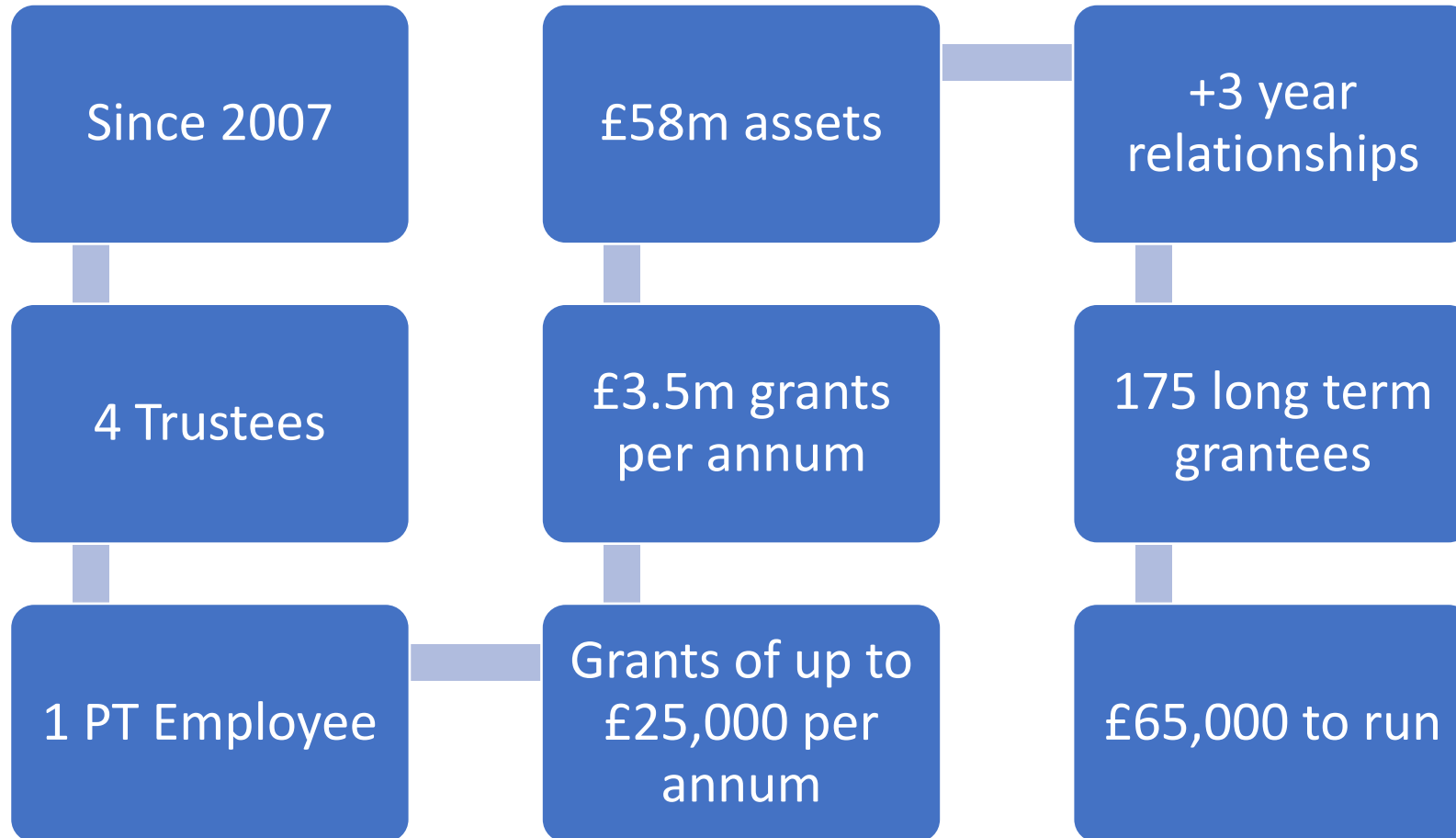
Supporting

Older People



We work with a range of charitable organisations supporting older people (over 55) in the region. in particular:

Who we are (in numbers)



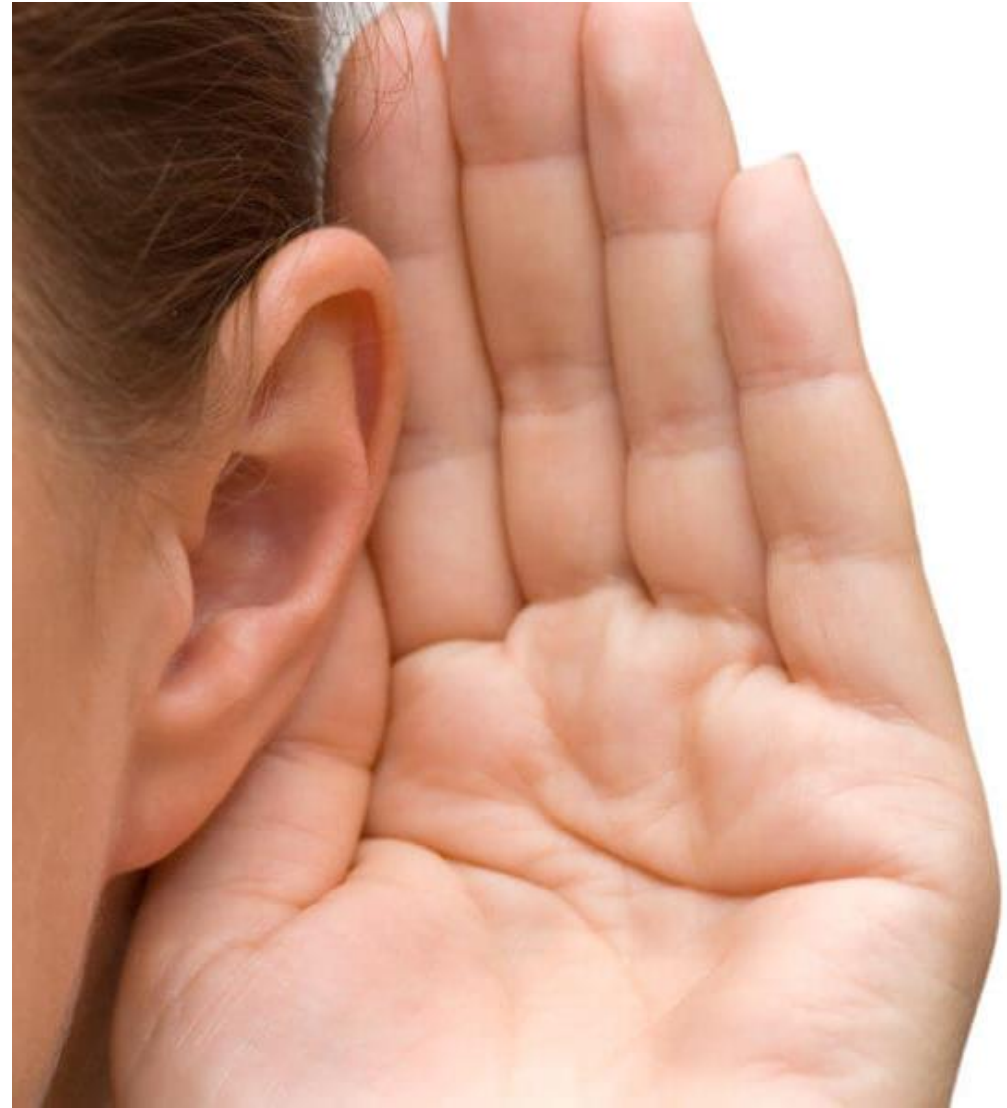
At our heart....

- It's not about us
- Try to listen
- Aim to be uncomplicated
- Engage in quick decision-making
- **At the service of the sector**
- Want to enjoy it!!



What do we hear?

- More unrestricted / core
- Longer term / multi-year funding
- Saying NO more efficiently
- Minimise annual reporting
- Be more transparent





Is it really that easy...?

(**of course not)

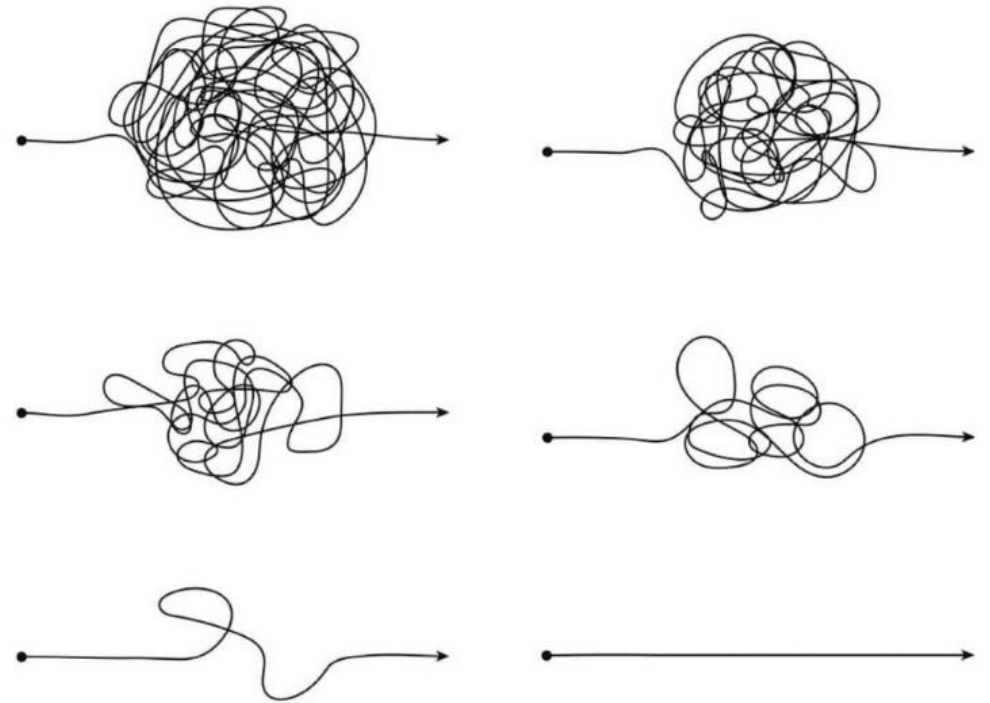
We understand our friends who are funders:

- Custodians of large funds (manage risk, controls)
- Accountability (what have we done with your money?)
 - To the public, or
 - To a corporate parent
- Multiple donors (hundreds, all with differing views)
- Family foundations
 - starting point of no expertise
 - don't want to mess it up
 - BUT opportunity to be different from those with more restrictive grant giving frameworks?

How we became uncomplicated

- The “5 minute” application
- Stop bending their mission
- We have to say NO, so.....
- Invest our time, not theirs
- Stop wasting their precious time

Make their time = success





Move quickly

- Monthly application review
- Two Trustees
- One week after month's end
- Then arrange visits to see applicants
- BUT visit only of those we can fund
- Offer unrestricted where we can
- Brief notes and recommendations to Trustees
- Quarterly Trustee decisions
- One page grant letter, online bank transfer
- Minimise reporting

Common sense....?

- we start a relationship
- we nurture that relationship
- we love that relationship

Why break it up.....?

Break-ups are exhausting.



Community Micro-grants



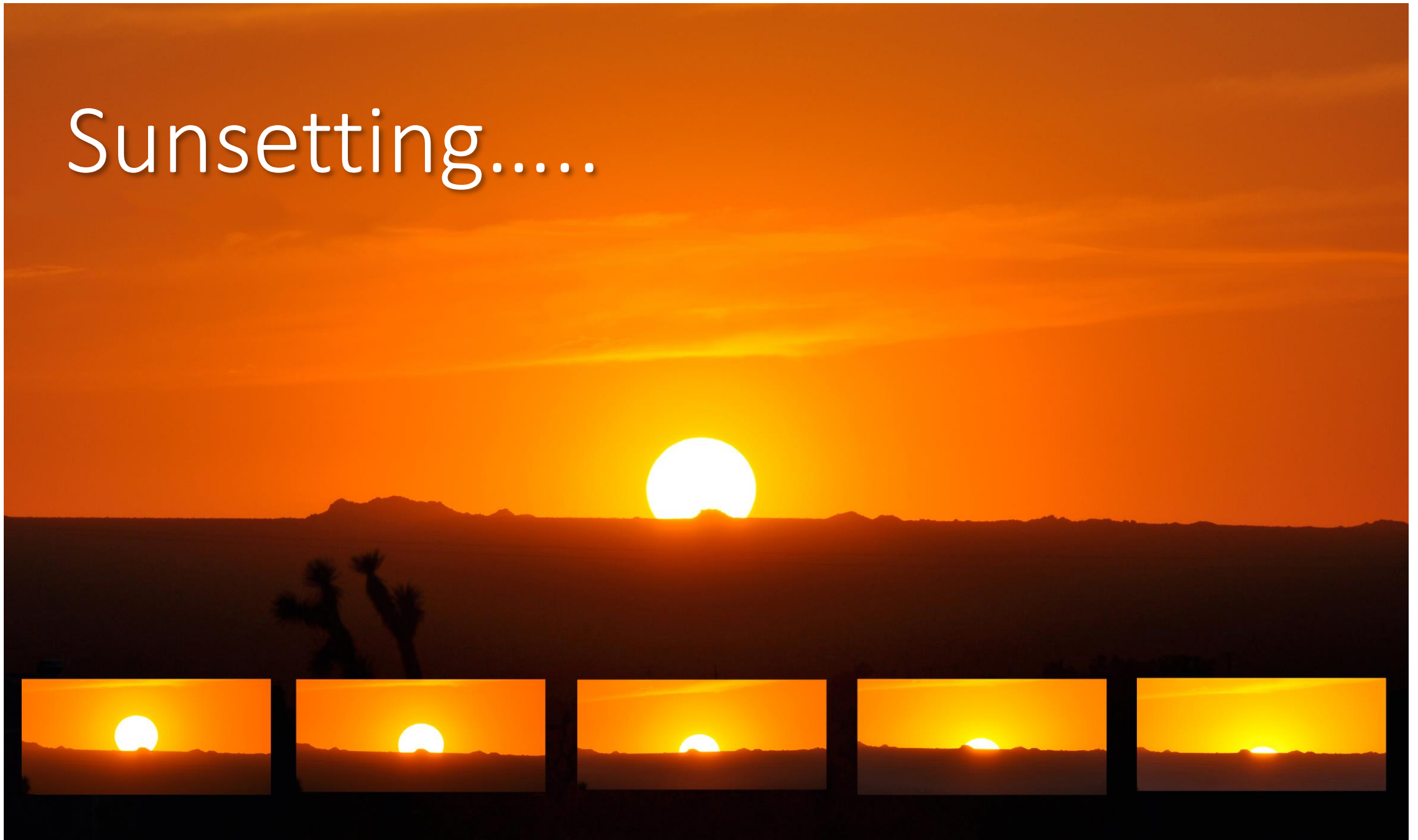
- Up to £1,000
- Volunteer-led
- Facilitated
- Quick
- Trustee decision limits
- Supports our older demographic
- Funding Fairs
- Serves as a risk-free introduction
- Everyone loves a photo

Efficiency

- 3 years ago
 - £1,521,706 grants
 - £55,207 BCT costs
 - 3.6%
- Last year
 - £3,471,034 grants
 - £65,011 BCT costs
 - 1.9%



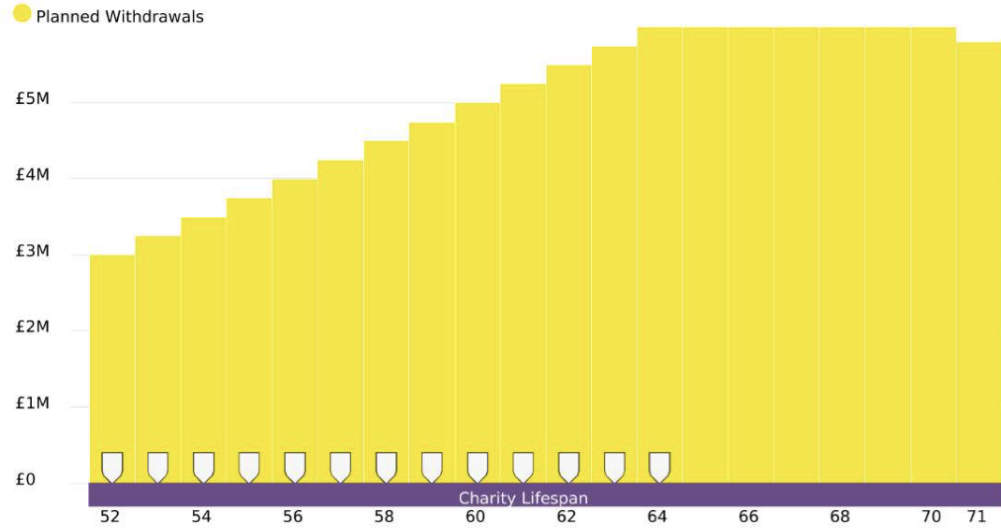
Sunsetting.....



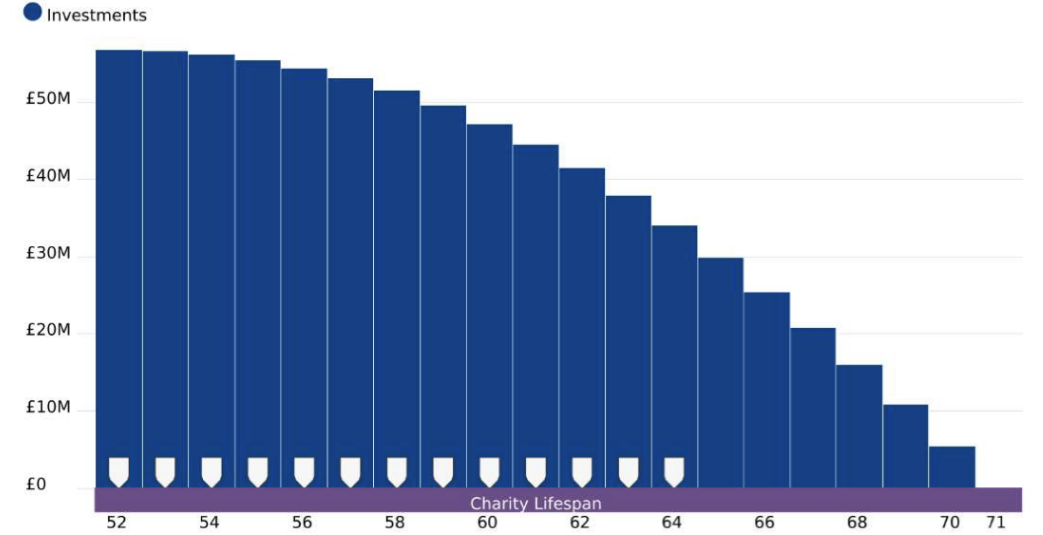
Considerations

- Connection to the founders
- Not codified
- Third Sector evolution
- Succession planning
- 20 years away
- Spend £100m to spend £55m
- Maintain those grant relationships
- And add more along the way

Cashflow



Assets



The original plan....

How is it going?



Uncertain



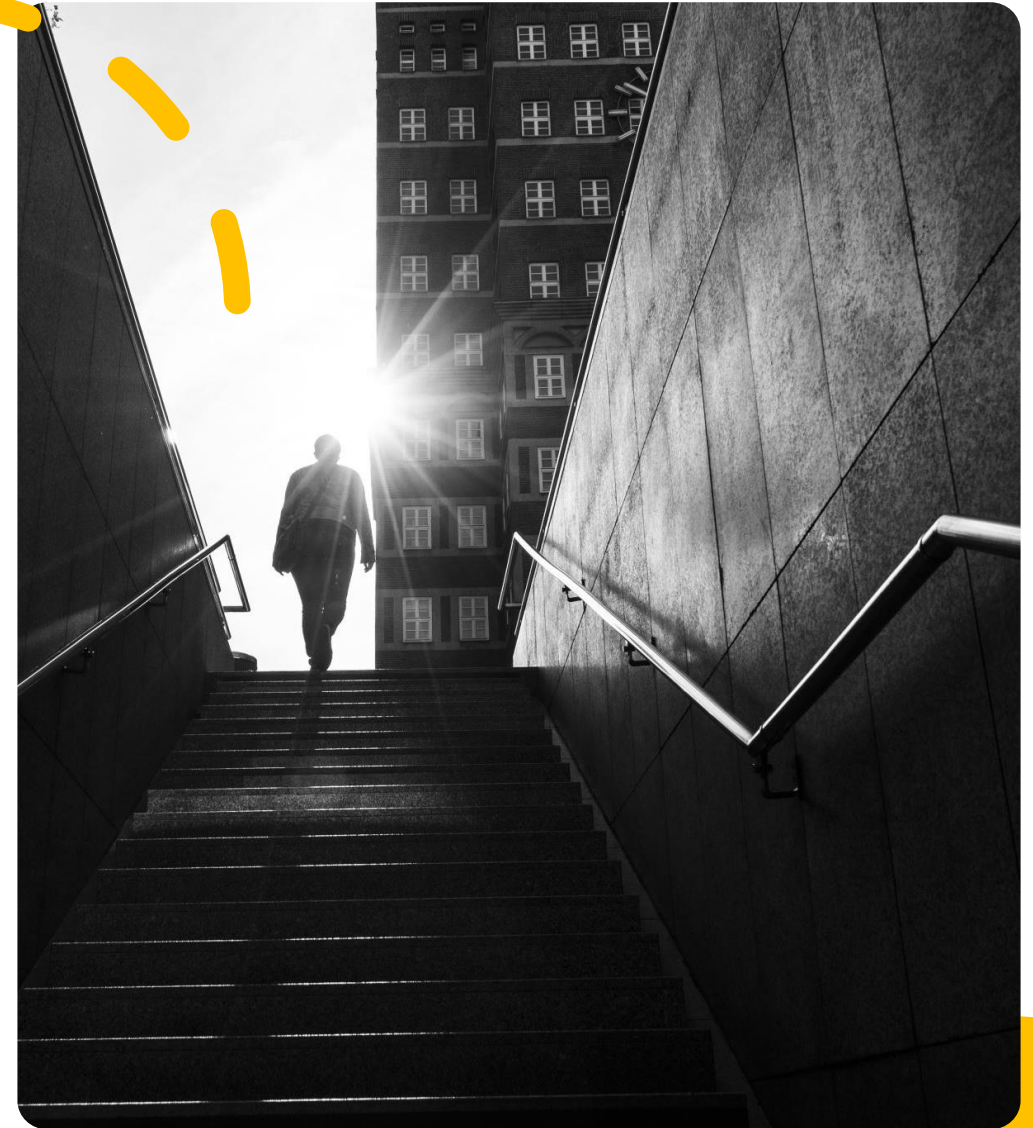
Grant discipline is hard



Flexibility in that spend down model



Not oblivious to counter-arguments





But what about funder
collaboration?



COMMUNITY
FUND



Sherburn House
Charity



northern rock
foundation

Lessons Learned

- Attracted to our simplicity? Keep it simple
- “Professional generosity”
- Coping with hurdles
- If we can manage the workload, there is no cost
- All funds distributed as grants
- Monitoring and feedback - our way
- Power of veto??



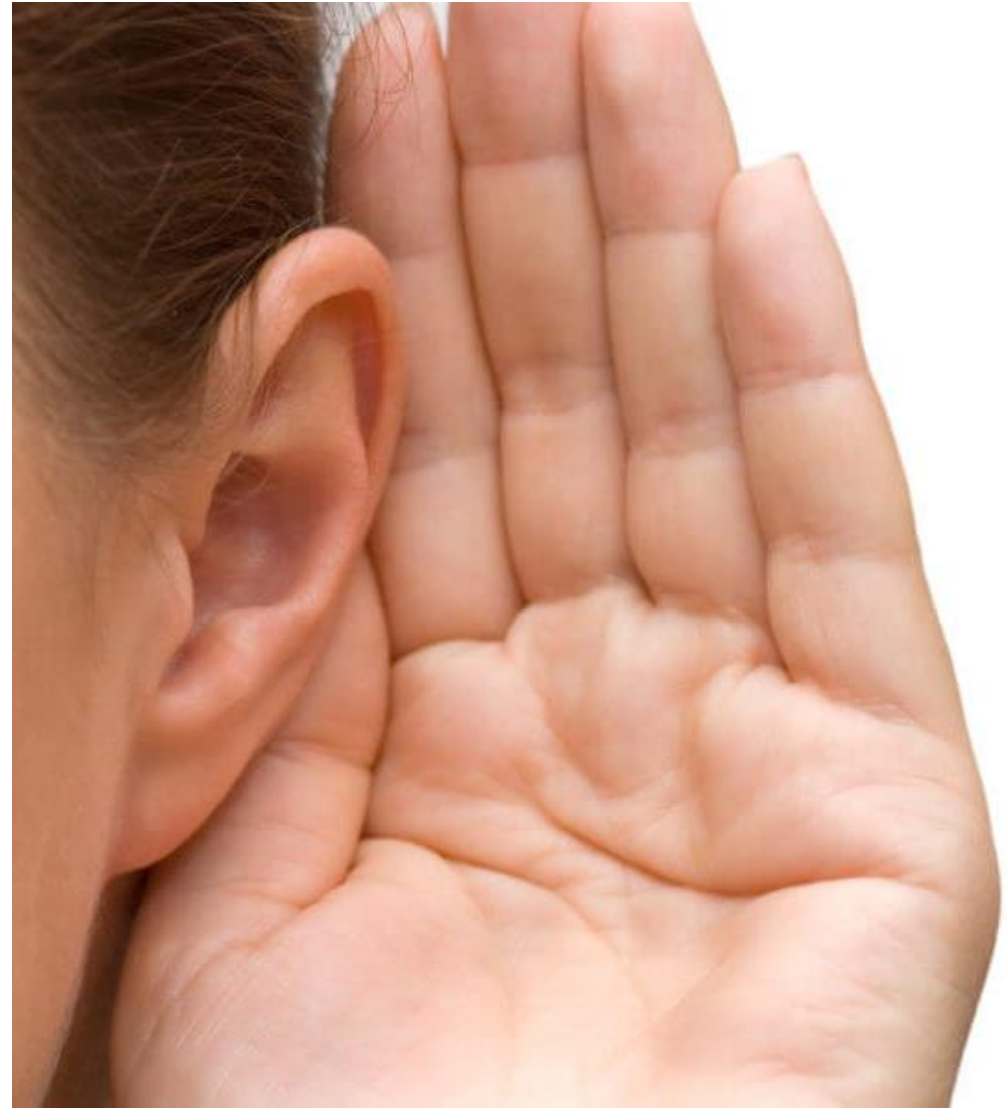
FINAL SLIDE!!

- **Demand Side - more**
- Cost of living
- Energy costs
- Retention and recruitment
- Budget impacts
- Increasing number of start-ups, incl CICs
- More people with more complex needs

- **Supply Side - squeeze**
 - Increased value / lower number
- AND
- Multi-year funding = less new grants
 - Strategic re-think = pause
 - Excessive demand = pause
 - Uneven spending = pause
 - Sunsetting = disappearing, disruption

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Any questions?



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