



CALOUSTE  
GULBENKIAN  
FOUNDATION

UK BRANCH  
STRATEGY 2014-2019

**EXPLORE**  
**EXPERIMENT**  
**EXCHANGE**  
**EXPLAIN**  
**EXIT**



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# SUMMARY

Our re-invigorated strategy for 2014-2019 builds on the platform of our last five years' work and reinforces our commitment to maximise the value we deliver with the resources available to us.

Based on a process of consultation and review we have developed a new articulation of our purpose derived both from the interests and concerns of our founder and our assessment of how we can best contribute to the work of the Foundation as a whole:

**to bring about long-term improvements in well-being, particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) which deliver social, cultural and environmental value.**

We strive to be strategic and we have therefore narrowed our focus to three new areas of activity: transitions in later life; arts with a social impact and ocean conservation. We will in addition continue to support work aimed at promoting social innovation and strengthening civil society, and securing the legacy of programmes which have recently reached their conclusion.

As we develop activity in each of our new areas we propose to explore, experiment, exchange, explain and exit (see the box for an explanation). We will continue to fund largely proactively undertaking research and consultation in order to find the best ideas and people to invest in.

**EXPLORE** we will support research which inspires new thinking and provides evidence to inform changes that will lead to increases in well-being.

**EXPERIMENT** we will support selected pilot interventions and occasional start-up organisations.

**EXCHANGE** we will act as a convenor and collaborator, fostering partnerships that might not otherwise happen, supporting and engaging in networks and hosting learning communities.

**EXPLAIN** we will seek to understand what happened and to disseminate the learning to those who can act on it.

**EXIT** we will seek to create a legacy so we can move on and address other issues.

In delivering our 2014-2019 programme we will seek to build on our most important characteristics, our:

- international remit and capacity to develop work with colleagues in Lisbon and Paris;
- strong interest in social innovation and our desire to understand and make best use of our place in the support ecology;
- commitment to work with partners and to ‘curating’ relationships which create greater impact than would be achieved if individuals or organisations worked alone;
- ambition to achieve paradigm change which means we have a long-time horizon and prioritise long-term change over short-term outcomes;
- ability to appreciate and exploit the synergies across our three core funding areas – social welfare, arts and the environment;
- commitment to develop and share learning as an important legacy of our funding which enables us to maximise the value derived from our investment.

# UK BRANCH STRATEGY 2014-2019

# INTRODUCTION

This strategy sets out how, over the next five years, the UK Branch of the Calouste Gulbenkian Foundation plans to build on a legacy of work spanning more than five decades. Based on a process of consultation and review, it reinvigorates and carries forward the main themes of the strategy we implemented in 2009:

- cultural understanding; fulfilling potential; the environment;
- and a cross-cutting theme of strengthening civil society and encouraging social innovation.

We retain these themes as a frame defining the areas in which we work.

Our new strategy also builds on the route map provided by the 2009 document. This set out a more focused approach to our work with time-limited programmes based on research to identify issues and how they might best be tackled. Since 2009 we have supported fewer organisations with larger amounts of money and greater follow-through support.

In some ways this is not a conventional strategy. Rather than a vision and mission we have a purpose, derived from the interests and concerns of our founder, and an approach based on our assessment of how best we can maximise beneficial impact in the UK and Ireland and contribute to the work of the Foundation as a whole. It defines our strands of activity, the insights on which they are based, the outcomes we seek to achieve and provides a framework for more specific strategies and plans for each strand. To explain more about the sort of organisation we are and why we operate in the way we do, this document contains two sections which provide background and context to the strategy: *Our Story of Change – the contribution we can make*; and *Explaining our Strategy – frequently asked questions*.

# WHO WE ARE

## OUR FOUNDER AND PARENT FOUNDATION

**Calouste Gulbenkian** was an Armenian born near Istanbul who worked in Britain and became a British citizen, lived in France and settled in Portugal. He was multi-cultural, multi-lingual and spent a lifetime bringing people together from different cultures and nationalities. This is reflected in the art collection he assembled, a unique mixture of Eastern and Western art. He also had a passion for horticulture and an interest in the natural environment. He thought of himself as a business architect rather than a businessman and was responsible for brokering some of the largest commercial joint ventures the world has known. His story is one of ambition, persistence, boldness, rigour and a willingness to explore, applying knowledge and fostering connections to achieve his wider aims. In endowing the Foundation, he wanted others to benefit from the legacy he left.

**The Calouste Gulbenkian Foundation** is an independent charitable foundation established in Portugal in 1956 with cultural, educational, social and scientific interests. It is one of the largest European foundations, with headquarters in Lisbon and offices in London (the UK Branch) and Paris. Most activities are based in Portugal but the Foundation's impact is felt more widely, building on its presence in three capital cities. In fulfilment of its founder's wishes to benefit "all humanity", it is becoming increasingly international and works extensively with other major international institutions.

The UK Branch aspires to bring about long-term improvements in well-being, particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) which deliver social, cultural and environmental value.

## OUR PURPOSE AND GENERAL APPROACH

Our approach is to establish how we can achieve the most impact by building on our experience of, and learning from, previous activities and by exploiting our intangible assets including our role as part of a much larger European foundation with the international connections that affords us. In all our activities we seek consistently to demonstrate a range of positive behaviours described later but including, for example, showing respect for our partners and challenging both ourselves and others. These behaviours define what partners can expect from us.

We seek to work closely with colleagues across the Foundation to maximise the potential synergies between the UK Branch and other departments and programmes. Generally, we seek to address problems common in a number of countries and, where possible, to act as an 'exchange' for ideas securing mutual benefit by sharing lessons internationally. Drawing on Calouste Gulbenkian's example, we are committed to 'curating' relationships across different sectoral and disciplinary boundaries and we continue to engage with international institutions and attend international fora to consider issues of transnational concern.

In the UK, where we are a relatively small funder and therefore cannot provide continuous funding, our emphasis has been on testing new approaches, evidence gathering and convening (see the box overleaf for a fuller explanation). We aim to be proactive in identifying the organisations and activities we want to support and work with partners to develop relationships of mutual benefit. We seek to champion the change we want to see rather than prioritising standard processes for selecting and supporting activities. We do not put organisations through complex and demanding application processes or set arbitrary levels of funding or funding periods. We seek to be outcome-orientated and place a significant emphasis on evaluation and communicating the learning from the work we support to those with the power to make change.

# IN 2014-2019 WE WILL:

## EXPLORE

We will support research which inspires new thinking and provides evidence to inform changes that will lead to increases in well-being.

## EXPERIMENT

We will support selected pilot interventions and occasional start-up organisations.

## EXCHANGE

We will act as a convenor and collaborator, fostering partnerships that might not otherwise happen, supporting and engaging in networks and hosting learning communities.

## EXPLAIN

We will seek to understand what happened and to disseminate the learning to those who can act on it.

## EXIT

We will seek to create a legacy so we can move on and address other issues.

# THE FOCUS OF OUR ACTIVITIES 2014-2019

We propose to build on our experience of implementing our last strategy by being even more rigorous in selecting the specific areas in which we will work; for this strategy period we have narrowed our focus to developing and delivering three new strands of activity:

## TRANSITIONS IN LATER LIFE

## ARTS WITH A SOCIAL IMPACT

## OCEAN CONSERVATION

These strands build on analysis of previous programmes of activity in the fields of: ageing, including our intergenerational work; cultural understanding, including our participatory performing arts award, and the environment including work which champions the value of people's connection to nature.

We will also seek to secure the legacy of, and disseminate the learning from, programmes that have recently reached, or are about to reach, their conclusion including, amongst others Portuguese visual arts, literature in translation, and 'greening the economy'.

We will continue to promote social innovation and to strengthen civil society both through our main strands of activity and by supporting networks, projects and initiatives we consider strategically important in creating the right conditions for beneficial change.

Research we have commissioned focused on understanding the funding ecology will inform an assessment as to where we can best focus our support – acting by ourselves and with others – to achieve an impact greater than our necessarily limited resources might otherwise allow.

# 5 YEAR STRATEGIC PRIORITIES

In order to contribute towards achieving our purpose of bringing about long-term improvements in well-being our priorities for 2014–2019 are to:

- 1** Increase knowledge about transitions in later life and secure more appropriate responses to the issues they create for older people.
- 2** Identify and support models of best practice and originality in the area of participatory performing arts/socially engaged performing arts.
- 3** Make connections and build relationships designed to help protect our oceans.
- 4** Create the conditions for change by promoting social innovation, strengthening civil society and working to advance our own and others' philanthropic practice.
- 5** Plan for legacy which maximises the on-going impact of our current programmes and develop new lines of enquiry which may develop into new priority strands in due course.
- 6** Strengthen our internal capacity to deliver.

In all our work, we will seek to create the right conditions for beneficial change by prioritising long-term interventions in wider systems over short-term, more easily attributable outcomes.

# THE INSIGHTS THAT GUIDE OUR APPROACH TO ACHIEVING IMPACT

Impact is achieved through the activities we fund, by the partners we work with and the way we work with them - our value added - to achieve change. Our design of new strands, including the identification of organisations to partner with, is informed by our awareness of the context in which we work; for example, the complexity and multi-faceted nature of many entrenched social problems. It is also informed by our understanding, based on our experience to date, of:

- the need to build *stronger communities* and, in doing so, the value of utilising the existing skills, expertise and talents of people and communities;
- the effectiveness of, and trust that users place in, services that are *co-designed* or *co-produced* and delivered in more person-centred ways on a human scale;
- the advantage of taking *preventative* action before problems become entrenched;
- the importance of *fresh perspectives* and new ways of working that *collaboration* across nations, disciplines, organisations and sectors can stimulate;
- the necessity of developing the evidence base and *generating new knowledge* as a launch pad for future action;
- the fact that *funding* is a small part of the value we provide with significant value lying in our convening and '*curating*' of relationships and *influencing* and *advocating* on behalf of the partners and causes we support;
- the significance of planning for *legacy* from strands of activity in the learning generated, the development of sustainable models and beneficial changes to policy and practice;
- the power of *culture and of cultural exchange* in stimulating creativity and building community resilience;
- the contribution of the *environment* and its conservation to human well-being;
- the unique vantage point afforded by our combined interests across the *arts, the environment and wider social issues*.

# DESIRED OUTCOMES

## HOW WE WILL MEASURE PROGRESS AND PERFORMANCE

For each of our three new activity strands, we are developing long-term measures of success: the outcomes we aim to have contributed to achieving over a five and ten year time horizon – beyond the period during which we will be directly engaged (see annex). We have adopted the *Funders' principles and drivers of good impact practice* developed by the Inspiring Impact coalition that we support.

All of our work will contribute to improvements in long-term well-being. We are particularly concerned with well-being that is relational: created through the relationships we have with each other, which builds tolerance, self-confidence and reduces conflict, social isolation and loneliness, and the relationship we have with nature. We are aware of the work that has been done by the OECD, the UK Office of National Statistics and others in seeking to develop substantive measures for well-being and will explore how this work can be built on and used to demonstrate the impact we contribute to achieving through and with our partners.

# BEHAVIOURS

Rather than values we prefer to articulate statements about what those who work with us can expect of us: behaviours which we strive to exhibit in all that we do. We will demonstrate:

## **CHALLENGE** (including ourselves)

**We are bold and ambitious; we challenge ourselves and our partners to do better – charitable resources are precious and limited and we want to fund only the best work, likely to have significant impact, undertaken by the best people.**

## **SUPPORTIVENESS**

**We endeavour to develop positive supportive relationships with all our partners, recognising that often they are developing and delivering projects with us that are new and difficult.**

## **RESPECT**

**We recognise that we contribute to change by supporting a range of partners – with money and in other ways, but primarily our impact is based on their brave leadership, commitment, skills, knowledge and experience.**

## **AUTHENTICITY**

**We seek to be authentic in the sense of being open and true to our aspirations and commitments and with human well-being at the centre of what we do.**

## **TRANSPARENCY**

**Because we mostly fund proactively there is a greater onus on us to be transparent about what we are funding and why and to provide a clear rationale.**

## **ADAPTABILITY**

**We acknowledge the need for adaptability given the complexity of some of the areas in which we are seeking to intervene and the probability of unforeseen consequences.**

# CONCLUSION

This document is informed by, our understanding of our heritage, what we observe about how beneficial change can be achieved, what we have learned in the previous phase of our history, and what our stakeholders have said about us. It builds on the platform of our last five years' work, and reinforces our commitment to maximise the value we deliver with the resources available to us.

We would welcome any comments you might have on this strategy and the supporting material included in the sections which follow, *Our Story of Change – the contribution we can make*, and *Explaining our Strategy – frequently asked questions*. Please email [info@gulbenkian.org.uk](mailto:info@gulbenkian.org.uk).



**OUR  
STORY  
OF  
CHANGE**  
THE CONTRIBUTION  
WE CAN MAKE

We aspire to bring about long-term improvements in well-being, particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) which deliver social, cultural and environmental value.

## THE CHANGE WE ARE SEEKING

Well-being depends on many factors and as individuals we place our own priorities on different dimensions. Although life satisfaction depends in part on our material living conditions, other things such as supportive social networks of family and community are crucially important. The UK Branch's concern is primarily with those whose lives are less fulfilled and who experience vulnerability, disadvantage or a lack of access to those aspects that can enhance their lives.

Our work to improve well-being in the different areas in which we operate is informed by insights into how change happens and how trusts and foundations have succeeded in contributing to positive social change. Our observations are not comprehensive but provide a framework for us to think through how best to approach each issue we decide to address and the contribution that we consider we can make.

## THE CHANGE-MAKING ROLE OF TRUSTS AND FOUNDATIONS

We know that trusts and foundations can play an important role in helping to bring about positive social change by:

- working strategically, addressing a limited number of specific causes whilst recognising that change is rarely linear;
- playing a proactive, catalytic role in helping to mobilise others;
- working across sectoral divides including the profit and not-for-profit, governmental and non-governmental;
- seeking to be transformative rather than simply transactional (deploying capabilities that lie beyond simply selecting good projects for funding);
- taking a long-term view.

To achieve long-term change requires clarity about the outcomes. We must also recognise that short-term, direct and attributable outcomes may need to be subordinated to a commitment to taking a long-term, systemic view that prioritises creating the conditions for change rather than the change itself.

## THE LEVELS AT WHICH WE CAN WORK

We are aware that improved well-being might be achieved at different levels through:

- **cultural change:** trying to change the way people think, which leads to changes in individual or collective behaviour;
- **organisational change:** encouraging change in the way organisations act;
- **corporate change:** helping stimulate demand, shape markets and influence the way that organisations deliver products and services and what they provide;
- **policy change:** promoting changes in public spending and the rules that apply at different levels – in the way they are enforced and breaches penalised;
- **structural or “big system” change:** encouraging change at each level in the system, the components, how they interconnect and interact, and the processes, supply chains and their configuration that determine cause and effect and connect the macro with the micro.

We also recognise that important social innovations can stem from incremental changes in systems or processes and that significant change may emerge from a simple but powerful idea.

## THE TACTICS WE CAN EMPLOY

Research and our own experience suggest particular tactics that underpin positive social change initiatives. They are:

- the generation of fresh insights;
- advocacy – working with others to make a case for change and identifying how to make it;
- forging networks of like-minded organisations and empowering them to act;
- providing leadership where necessary and knowing when to take the lead and when to fall back;
- placing an emphasis on learning – not for its own sake but in order to elicit change;
- working across sectors including the private sector to blend social purpose with profit;
- understanding our, and others', place in the system.

## HOW WE PROPOSE TO CREATE CHANGE

Whether we focus on one level, a combination, or indeed all of them will depend on each strand objective (for example, working to reduce loneliness in later life, to promote socially engaged performing arts, to protect the marine environment) and which type of activity is likely to be most appropriate. Nonetheless, it is possible to generalise about some of the ways in which we will act at the levels of strategy and tactics.

Taking into account the role that a foundation can play in achieving social change and our specific interest in improving well-being and our distinctive qualities/attributes, for each issue we decide to address, we will:

### SCOPE AND DESIGN

**Identify and clarify the problem:** it is key to understand the nature of detriment, who experiences it and to what extent.

**Understand the context:** we also need to understand the problems and the opportunities – what “good” looks like – the givens and the variables, the deficits and the assets available to us, the different actors involved, their roles, motivations and constraints, imagine possibilities for things being different and look for the levers that may be available to us to bring about change.

We will then act in some of the following ways:

## POSSIBLE ACTIONS

**Develop the evidence base:** we can create value by increasing knowledge and understanding – sharing knowledge has the potential to generate significant social impact because it can persuade others to act.

**Raise awareness of an issue or problem:** we can draw problems to the attention of and try to influence those who set the rules – the policy makers, we can encourage action from providers and we can encourage potential beneficiaries to become more demanding consumers. Giving the beneficiaries of change – those who experience detriment in service provision or from the threatened environment – a voice can be very effective.

**Reframe problems and shape attitudes:** we can help to reframe concepts and communicate messages to audiences in different and more compelling ways; for example, by enabling artists and designers to apply their skills to social and environmental issues.

**Work to shape markets:** we can make efforts to influence those who procure or commission services to ensure that the needs of the most vulnerable are catered for or stimulate demand by enabling individuals to select their own services.

**Stimulate social innovation:** we can inspire and support the development of new or re-designed products and services where they are needed by helping to develop new approaches, testing them, gathering evidence as to their benefits and costs, identifying opportunities for replication and scaling, or adaptation for wider benefit. In supporting the “new”, we will be prepared to experiment and consider outcomes that haven’t been foreseen and to learn from projects that do not go to plan.

### **Help release the creativity and energy of users and beneficiaries:**

we can support the development of better solutions by involving service users in design and/or delivery which we consider can be an effective way of shaping services, and of enabling beneficiaries to mobilise to campaign for change and take control of their own lives.

### **Support the “change-makers”:**

we can back the brave and creative people with the ideas and energy to make change. They need the time and space to learn and the organisations they work with and through need the capacity and capability to deliver.

### **Create “communities of practice”:**

we can bring groups of people together with the potential to generate new ideas and collective value and spread learning. Convening different actors, particularly those who are not the usual suspects, can have a significant impact in the development of solutions and to securing their implementation.

**Connect sectors:** we cannot meet the many problems facing society by acting alone and we must work with others if we are to have a wider and longer-lasting impact. We are a small part of a complex ecology: working across the public, business and social sectors can lead to wider change.

**Ensure a legacy:** finally, we can plan for our exit from the time-limited interventions we support, adopting approaches sometimes taken by “spend out foundations”, factoring in continuing legacy, learning and sustainability to our plans and understanding the roles others can play.

## **THE TOOLS WE USE**

Our greatest tangible asset is our financial resource which we can apply strategically and creatively in addressing the issues or problems we choose to work on.

We can also employ other, intangible, assets: our reputation, our independence, our flexibility as a small organisation and ability to act quickly, our capacity to network and to broker partnerships and, as part of a large European foundation, our transnational remit and potential to act as an “exchange” for ideas.

## **IMPLEMENTING OUR STRATEGY**

We will draw on these insights as to how change can be brought about and the role of trusts and foundations as catalysts for improving well-being in implementing our ambitious strategy for 2014–2019. It will require us to be more focused and rigorous, transparent and engaged – with our partners and with the issues on which they work – and to have a strong orientation towards learning and legacy.

# EXPLAINING OUR STRATEGY

FREQUENTLY ASKED QUESTIONS

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**Why do we find well-being to be a useful framing device?**

Our founder was concerned to “benefit all humanity” and granted his foundation wide powers to work across the arts, education, science and social welfare, all of which are important to human flourishing or well-being. We have chosen to articulate our mission by drawing on recent efforts to qualify and quantify well-being (and to do so positively rather than simply focusing on detriment). In defining well-being some prioritise the material (jobs, houses, food) while others emphasise the emotional (aspects of well-being which relate to social connection, resilience, to confidence and opportunities to fulfil potential and express our innate creativity).

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**What do we mean by wellbeing?**

With so much emphasis on measuring social progress by economic indicators, it seems reasonable to seek to provide a counterweight and to focus primarily on aspects of well-being, generally non material, that can be achieved through support of social, arts and environmental initiatives. The UK Branch’s concern is primarily with those who are vulnerable, who suffer disadvantage and lack access to the opportunities that others who have more advantages take for granted. A focus on “well-being” provides a basis for making a relative assessment as to the impact of our work on their lives.

## What are our areas of focus?

In determining our focus we have particular experience on which to build: we have previously explored a number of different elements of non-material well-being including social connectedness and participation in society, cultural cohesion and the beneficial impact of engagement with nature. This has led us to concentrate our work under three new priority strands:

- 1 Improving the ability of people, particularly those in later life, to manage sometimes destabilising and distressing transitions in their lives – which in many instances lead to chronic loneliness – can significantly enhance well-being.
- 2 We have a long-standing record of some significant interventions in the arts in the UK with ground-breaking work in relation to the arts in schools and communities. This work has taught us that participatory approaches which blend the amateur and the professional, and give them equal status can be profound drivers for well-being.
- 3 The threat to our oceans has the potential to adversely affect the lives of people the world over; long-term changes in biodiversity and the depletion of natural resources are creating major shifts in our relationship with the natural world.

## Why have we chosen to focus on particular social groups/social and environmental issues?

We have an aspiration to improve well-being but, given the limited resources available to us to create impact, we need to be selective. We know that there is work to be done in each of these areas and we consider that with our experience and history, our particular way of working – including being bold and taking a long-term view – we can help to fill these gaps and to bring about change with the ultimate aim of improving well-being. Of course we are not unique and do not act alone but we believe we have a particularly beneficial role to play in these areas.

We have determined our strategic priorities on the basis of a number of factors:

- an existing track record of working in an area which is the basis of a sound awareness and understanding and strong networks;
- an urgent and pressing need (for example in relation to our work on ageing and life transitions because of an impending demographic crisis and the growing problem of loneliness and isolation amongst older people);

- their connection with work supported by programmes run by the Foundation in Lisbon and Paris with the possibility that provides for cross-national learning and exchange;
- our interest in working across functional boundaries to promote non-material well-being (for example, the arts and social welfare).

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### **What do we mean by helping to create the conditions for change?**

Alongside specific and focused activity strands, we seek to make a contribution to increasing understanding of how change happens. We believe we have a role in connecting “change-makers”, and supporting collaborative networks where people and organisations can meet, share thinking and identify new initiatives which can help bring about change. We feel that great things can emerge from encounters between “unusual suspects”.

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### **Why the emphasis on collaboration?**

With his background in the Ottoman East and his life spent in Western Europe, our founder spent his lifetime bringing people together and fostering connections to achieve his business aims. He saw the greater value of being a “small part of a larger pie than a big part of a small one”. We therefore begin with a mind-set that seeks to create new coalitions of interest that challenge traditional approaches. So, for example, we believe that focusing only on the costs of an ageing society is to misunderstand the multi-dimensional nature of change. New markets for social care and “silver” technologies, new modes of fostering intergenerational learning, new ways of blurring the education-work-retirement boundaries are all huge opportunities. They are opportunities based on fostering new collaborations across functional or sectoral divides.

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### **Why the interest in social innovation and the strengthening of civil society?**

Our founder’s genius for systematic thinking leads us to seek to understand the markets or systems in the areas in which we work. It means that we aspire to intervene in a way that creates an enabling environment for the creation of more responsive and efficacious approaches; hence our interest in funding initiatives which promote social innovation or which aim to strengthen civil society as deliverers of services and campaigners for change. While the focus of our funding is the ‘not for profit sector’, we recognise that one important means of supporting innovation and strengthening civil society is by encouraging exchange of learning between different organisations and disciplines, particularly across sectors.

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### Why the emphasis on personalisation and co-production?

In the past we have supported work applying product design methodologies to the social sector and we recognise the value that they can deliver. Such work now has currency because public spending constraint and a general concern about the capacity to deal with issues have increased awareness that we will need to find ways of leveraging – rather than ignoring – the capacity of people to cooperate, often in new ways, to meet their own needs. Usually, this is a case of building on individual and community assets, including the skills, experience and interests of people whose potential contribution may have been undervalued.

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### How will we measure our contribution?

We have established some short-term outputs and medium-term outcomes we hope to achieve in our activity areas. We have also set some long-term outcomes that we hope will be the result of our earlier-stage interventions; outcomes likely to be achieved after we have moved on to address other issues (see annex).

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### How do we work?

The UK Branch benefits from the endowment our Founder left and receives an annual grant from the Foundation. About a quarter of this covers the cost of staff essential to our way of working with the majority of our funds deployed in grants to organisations we work with to help meet our key priorities.

- We support a range of organisations with funding and in other ways – providing advice and practical support, workshops, seminars and networking opportunities, meeting facilities and, in a few cases, core services.
- We also initiate and support some “direct” activities related to our priorities: research, evaluation, dissemination, events, conferences and attendance of staff and colleagues at these and other learning opportunities, costs of pilot projects, core costs related to collaborations between organisations and sometimes start-ups.

Because of our relatively limited resources, we tend to focus on early stage funding and cannot provide large-scale or continuous support. The majority is determined proactively on the basis of the research we undertake. We consider some unsolicited proposals to our “open fund”, through which we hope to attract exceptional organisations and ideas that our research has not identified.

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### How do we select organisations to work with?

We select partners proactively through a rigorous process of: research, engagement in a wide range of networks, and open consultation. From time to time, we may issue a “call or application”. This may be completely open or we may invite a defined group of organisations to submit proposals for initiatives that meet particular criteria. We also maintain our “open fund” which allows us to consider proposals from organisations that our research has not identified. We should stress that only the most exceptional proposals that meet our current strategic priorities are likely to be successful with less than 1% of unsolicited applications receiving support over the last three years. At the same time, we want to remain open to proposals from peer organisations - trusts, foundations and other funders - to collaborate in projects that loosely meet our priorities; we are enthusiastic about funder collaboration and have identified a small budget for proposals our peers approach us with.

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### How do we work internationally?

Unlike many UK-based charitable foundations, we are not constrained to working in a limited domain. Our status as part of one of the largest charitable foundations in Europe with headquarters in Portugal and a presence in France as well as in London, where the UK Branch is based, means that we are unusually placed to explore common problems across these and other national boundaries. We aim to work closely with our colleagues in Lisbon and Paris and engage in international fora as a means of gaining fresh insights, sharing knowledge and meeting our own aims as well as helping our colleagues meet theirs.

**Annex: For our specific priorities and strands we aspire to achieve the following outcomes (after one year, five years and longer-term after we have exited):**

### **STRATEGIC PRIORITY 1**

**Increase knowledge about transitions in later life and secure more appropriate responses to the issues they create for older people.**

- 2014** Campaign to End Loneliness has broader and more influential engagement. Increased knowledge about the impact of transitions in middle and later life with learning community under development.
  - 2018** Creation of a strong community of practice to support change.
  - 2023** Reduced loneliness in later life with people in mid-life enabled to be more resilient and better able to respond positively to change.
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### **STRATEGIC PRIORITY 2**

**Identify and support models of best practice and originality in the area of participatory performing arts/socially engaged performing arts.**

- 2014** Selection and support of a small number of groundbreaking models and cross boundary collaborations.
  - 2018** An evidence base from the testing of these models and a strong community of practice.
  - 2023** Participatory practice becomes mainstream.
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### **STRATEGIC PRIORITY 3**

**Make connections and build relationships designed to help protect our oceans.**

- 2014** Identification of our niche, early planning and development of platforms for collaboration.
  - 2018** New platforms for collaboration across sectors and improved knowledge flows, increasing willingness and capacity to protect the oceans.
  - 2023** Cross-sectoral collaboration is mainstream. A demonstrable increase in willingness and capacity to protect the oceans.
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### **STRATEGIC PRIORITY 4**

**Create the conditions for change by promoting social innovation and strengthening civil society**

- 2014** A transformed relationship with, and better connections between, selected partners based on the contribution their work can make across our funding strands.

## STRATEGIC PRIORITY 5

**Plan for legacy which maximises the ongoing impact of our interventions and develop new lines of enquiry which emerge from our strands of activity.**

### MULTIPLE NEEDS

- 2016** Building legacy for Making Every Adult Matter (MEAM) by connecting with key actors including funders and exploring other collaborations and interventions with exit by 2017.
- 2022** In a majority of areas across England, people with multiple needs are supported by effective, co-ordinated services and empowered to reach their potential.

### LITERATURE IN TRANSLATION

- 2014** Support towards sector consolidation and sustainability, evaluation and exit.
- 2023** Increase in quantity, quality and diversity of international literature in translation available in the UK.

### VALUING NATURE

- 2014** Develop and implement learning, evaluation and dissemination plan for exit in 2015.
- 2018** Demonstrable contribution to policy and practice.

### GREENING THE ECONOMY

- 2014** Implement legacy and dissemination plan with exit.
- 2018** Demonstrable contribution to policy and practice.

## STRATEGIC PRIORITY 6

**Strengthen our internal capacity to deliver.**

- 2014** A consistent, proportionate approach to due diligence is embedded including for follow-through.
- Learning, evaluation and communications plans developed for new activity strands.
- Production of one model learning report on a programme nearing its end.
- Review of systems and processes (including the website and information management systems).
- Professional development to support colleagues in the delivery of plans.

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