Annual Review 2017/18



CALOUSTE GULBENKIAN FOUNDATION

UK BRANCH

Our purpose

Our five-year plan

We are an international charitable foundation with cultural, educational, social and scientific interests, headquartered in Lisbon with offices in London and Paris. The purpose of the UK Branch in London is to bring about long-term improvements in wellbeing, particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) that deliver social, cultural and environmental value.

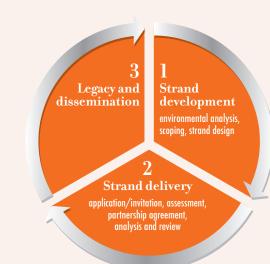
The UK Branch works to support the Foundation's strategic priorities of sustainability, social cohesion and integration. We aim to help increase the impact of the Foundation as a whole. We are at the mid-point of our 2014–19 plan. Three targeted strands – Transitions in Later Life, Valuing the Ocean and the Inquiry into the Civic Role of Arts Organisations – are supported by crosscutting work on Creating the Conditions for Change, which seeks to build collaboration and support social innovation. We also continue work to secure the legacy of programmes that have reached their conclusion.

Front cover: #OneLess strives to cut plastic pollution from single-use water bottles entering the ocean via London. The 2017 Big Bottle Count found 40% of plastic bottles washed up by the Thames were this type. (Photo: ZSL)



How we work

Our way of working is to consult and collaborate with others so as to develop, deliver and then disseminate each strand.



A key component of our approach is support for the development of networks and other collaborations. Each strand supports a 'learning community' in which our partners come together to exchange learning and advance their field of practice.

Evaluation, reporting and learning are embedded in each stage of the programme cycle from early research and scoping to legacy and dissemination. Evaluation frameworks designed in collaboration with our partners enable us to assess outcomes, capture learning and to feed this into future planning.

We recognise the importance of effective communications. We develop influencing plans for each strand. The objectives are to bring our work to the attention of others and disseminate the learning to those who can act on it to make a positive difference.

We plan for legacy early in the life of our strands of work by, for example, helping partners to develop their case for support and seeking to interest other funders in our areas of shared interest.

SUMMARISING OUR APPROACH

Explore

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

Experiment

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

Exchange

We will act as a convenor and collaborator, bringing people together and 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.

> "Our approach is to act as a tour organiser: we have a destination in mind but invite travellers on a journey in which they self-discover and cocreate a future."

UK Branch Director's Report

Charitable foundations are uniquely placed to take a longerterm view of society's problems, a perspective that defies the sometimes short-term nature of commercial or political cycles.

At the UK Branch of the Calouste Gulbenkian Foundation, we see addressing future needs as central to maximising our impact. Such 'future-proofing' might mean exploring issues that have yet to attract broader attention or prioritising root causes or prevention. It might require a level of persistence including longerterm investment over the life-cycle of an initiative and working with other trusts and foundations.

This Review demonstrates how we have set about this over the past year. Whether it's preparing those nearing retirement for later life, supporting arts organisations to fulfil their 'civic role', or promoting ocean conservation, we want to help future-proof society against some of the challenges we collectively face. We don't act at the front line. We don't deliver or fund services. Rather, in everything we do we seek to create the *conditions* for change. We work with others who, together, can bring about systemic and sustainable change. Moments of reflection – in which we capture learning and adapt – are critical in this. This past year, we have learned that:

- leadership must be 'adaptive': at times we follow, at critical points we are more directive
- the supply of new interventions must be matched by demand
- future solutions may lie in our past; how we describe the challenge is crucial.

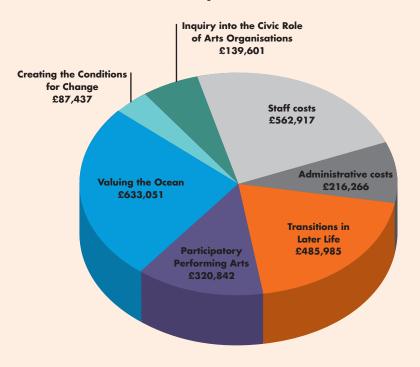
Our work on marine conservation (see page 6) maintains a fine balance between allowing ideas to emerge in response to reflection and external opportunities and focusing on specific goals. Our 'Marine CoLABoration' ('CoLAB') gives non-governmental organisations (NGOs) space to explore and experiment. CoLAB participants act as 'anchors' within their parent organisations, spreading the value of what they do more widely. We seek co-funding for initiatives to avoid privileging 'our own'. We are identifying how more NGOs can communicate the value of the ocean more effectively.

But it is also right that, at appropriate points in strands, we articulate what change we want to see. Two years in, we have communicated our long-term goals, consulted with partners, and agreed how we can all contribute. By the end of 2020, more people in the UK will know their wellbeing and prosperity depend on a healthy ocean – and will support actions to protect it. Recent announcements from the Government give us cause for optimism.

Our work on transitions in later life, particularly focusing on retirement (see page 4), has seen promising progress in our pilot projects. However successful, these projects on their own won't shift large numbers towards preparing better for later life. We have begun working with Citizens Advice, a national provider with significant reach. Our partners, the Centre for Ageing Better, have brought additional resources and skills in evaluation and communications. We also plan to develop a business case persuading forward-thinking employers to build pre-retirement review into their package of employee benefits. Our ambition is to build demand so that this invaluable support for the future becomes normal as we progress through our working lives.

So it is with our Inquiry into the Civic Role of Arts Organisations (see page 8). Many organisations are breaking new ground. Our ambition has been to highlight and understand current practice as a means of helping organisations to imagine the future. We have been helped enormously by Alistair Hudson's compelling image of placing practice on a three-point dial. Version 1.0 organisations see the arts as a means of education. Version 2.0 organisations stress access and participation. Version 3.0 organisations emphasise coproduction, everyday creativity and 'user-generated' content. Our collection of 4.0 (and growing) case studies of inspiring practice (enlivened by two examples from the Foundation's PARTIS programme in Portugal) has shown how theoretical ideas can become concrete examples.

Financial Summary UK Branch 2017



We have ourselves turned the usual programme model on its head, engaging widely in an initial debate around the question: how can 21st century arts organisations better fulfil their civic role?

Engaging organisations, and those they benefit, in developing what we do is at the heart of all our work. Three years ago, with the Big Lottery Fund, we championed an 'ecosystem approach' to funding: understanding that the greatest impact comes from funders working in harmony, each focusing on what it does best. We are pleased that this notion – funders aligning at different points on the 'innovation spectrum' – has gained traction. We hope more will identify with this. We are now extending this approach beyond funding in our own ways of working. The Marine CoLab shows how different NGOs act better in different areas – and that we can curate relationships between organisations.

All this does strain the traditional foundation model: invite and assess proposals, then support them to achieve clear outcomes. Our approach is more to act as a tour organiser: we have a destination in mind but invite travellers on a journey in which they self-discover and co-create a future. This can be a challenge. Not always knowing where, precisely, you are is as nervewracking for us as it is for our partners with big goals in sight. This is about achieving more than we ever could alone: building a porous movement of people and organisations heading in broadly the same direction. It's about working across boundaries and thinking laterally, accepting that change is not linear, learning from others and reflecting on our own practice, considering what's worked before and what might in the future. That requires a willingness to work *with*, not *for* or *to*, and – above all – an overriding commitment to delivering the best possible results.

Andrew Sament

Andrew Barnett

Transitions in Later Life

Helping people in mid- to later life feel better supported to manage change as they age...

We want to help people in midand later life to prepare better for the future as they age. Changes at this time – in work, personal circumstances, health, role, friendships, home – can feel destabilising and distressing. But advice for those coming up to retirement pays scant regard to these; the emphasis is on financial planning. We know from our previous work helping to establish the Campaign to End Loneliness that we cannot afford to ignore the psychosocial side of ageing. We believe that pre-retirement policies and services must cover a broader range of issues related to quality of life and emotional health and wellbeing. Our ambition is to develop a holistic approach that will future-proof health and social issues in later life.

"I've stopped focusing" on what we don't have and can't do. and started focusing on what we do have and what we can do." Workshop participant

Strand development and achievements

This strand tackles the need to prepare psychologically for changes in later life. Phase 1 focused on building relationships with employers and piloting pre-retirement interventions.

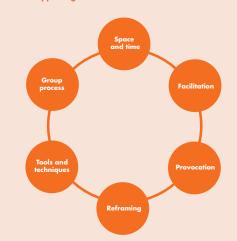
This year we scaled up our ambitions. We are supporting projects to spread and embed their approaches. We are working with a broader range of national partners to change attitudes to ageing and remove barriers to support. We are telling stories from projects through evaluations, media work and podcasts, so as to increase understanding of why wellbeing approaches matter. We are researching attitudes to ageing across generations and what might motivate people to prepare better for it.

Support summary: £485,985

Podcasts and a video on our website allow workshop participants to tell their stories. (Photo: Centre for Ageing Better)



Below: The Phase 1 evaluation identified six key elements for courses supporting transitions.



Highlights

With the Centre for Ageing Better, we co-published our evaluation of the seven pilot projects from Phase 1. This shows what outcomes holistic approaches can achieve. Participants felt better equipped and more confident to deal with change and future challenges. Months after courses ended, they still reported a much more positive outlook to later life.



We are continuing our partnership with the Centre for Ageing Better. This focuses on building the evidence base for innovative approaches. Together we will be working with Swansea University on an evaluation of the Phase 2 projects.

Six of these projects are now working to embed group-based interventions into the long-term practice of the provider organisations.

We have initiated two new pilots with Citizens Advice (CA). We worked with local offices to design local solutions. High Wycombe CA is exploring support for informal carers in later life who are facing financial and emotional

Above: The Learning Community is developing sustainable networks, showing the strength of a partnership approach for sharing best practice.

adversity. Powys CA will test support

for the 'Sandwich Generation' - those

caring for children, grandchildren and

ageing parents, but not themselves.

Both are using client-led service

design to refine a model that best

We have commissioned the Royal

Society for Public Health (RSPH) to

research intergenerational views of

ageing and retirement. This publicfacing work, using focus groups and

interviews, will help us and the sector challenge ageist assumptions.

SUPPORTING PEOPLE

TRANSITIONS

Dance)

suits carers.

What have we learnt?

We've seen the promise of psychosocial approaches for improving people's readiness for the future and their perceptions of ageing. Independent evaluation in Phase 2 will strengthen the evidence on impact. More broadly, we are seeking early adopter employers to roll out this work.

What next?

We will release findings from the RSPH research early in 2018, with the Phase 2 evaluation following later in the year. We are also undertaking ethnographic research with Citizens Advice, scoping how more people could access transitions support.



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Valuing the Ocean

Connecting and building relationships designed to help protect our ocean...

We want to communicate the many ways our ocean contributes to human wellbeing, culture and prosperity. The healthy functioning of the ocean is critical to the future of life as we know it. But it faces immense pressure from climate change, pollution, overfishing and more. We are testing the hypothesis that an approach rooted in values will deliver better outcomes for people and planet. This would frame new narratives around shared values which are cultural, aesthetic and intrinsic, not just economic. Our ambition is to strengthen collaboration within the environmental sector and its capacity to take a step change to better and faster ocean conservation.

> Right: The Ocean Connects Us event uncovered a strong appetite for new collaborations to communicate the value of the ocean. (Photo: Nik Gaffney/FOAM)

"Our connection to and dependence on the ocean extends well beyond what can be bought or sold."

Heather Koldewey, Zoological Society of London



Strand development and achievements

Phase 1 completed in 2017. It focused on developing collaboration, testing new approaches and finding gaps in the public's understanding of marine problems. Our partnership of expert NGOs, the Marine CoLABoration, explored a values-based approach to decision-making. Innovative projects have shown significant potential. Cognitive research uncovered the gaps between expert and public understanding. Phase 1 identified core 'change-makers'; Phase 2 will focus on widening networks and building capacity to deploy new approaches. Collaboration with the Gulbenkian Oceans Initiative (GOI) led from our Head Office has been an important element of this strand.

Support summary: £633,051

Environmentation to combine the former of th

Below: Communications INC's quirky crocheted sea creatures enlivened UN debate on a new high seas treaty. Delegates warmly welcomed the imaginative, values-based approach – competing to collect different creatures. (Photo: Francis Dejon (IISD))



Highlights

We launched *Getting Below the Surface*, a milestone report into public understanding of the ocean in the UK. Researchers from the FrameWorks Institute unearthed our strong connection to the sea as an 'island nation'. But their findings also show how crisis language, for example, can demotivate people. We want to test their reframing so as to empower NGOs to share a compelling story of the ocean's value. As a first step, we invited diverse stakeholders, including NGOs, scientists, artists and policy-makers, to an all-day launch event, *The Ocean* Connects Us.

#OneLess, the campaign to free London of single-use plastic water bottles, continues to build momentum. Advances include creating a map for systemic action, giving evidence to the Greater London Authority, and working with the UN to reduce the plastic footprint of the Sustainable Development Goal 14 conference. Plastic in the ocean has risen up the public agenda and has recently been addressed by local and central government.



Above: Scientists, artists, poets and historians celebrated our connection to the sea at the *Sounding the Sea* symposium in Hull, 2017 City of Culture. (Photo: Nick Harrison showing Tacita Dean, The Roaring Forties: Seven Boards in Seven Days, part of 'Offshore: artists explore the sea', courtesy of Invisible Dust)

The Marine Conservation Society (MCS) has been trialling a stakeholder engagement process called the Community Voices Method on the south and east coast of England. The Community Voices Method captures the perspectives of local people in a holistic, non-confrontational and inclusive way. MCS would like to roll out a Community Voices Method approach to improve marine

We are supporting The Wild Network to improve our national 'ocean literacy'. Working with an emerging collaboration of organisations and their audiences, The Wild Network will co-design and pilot innovative approaches to increasing public

understanding of marine issues.

management planning more widely.



Experts at a roundtable hosted by *Prospect* magazine argued that shortterm economic drivers must not undermine the ocean's long-term future. (Photo: *Prospect* Magazine)

The FrameWorks Institute research showed the sector that if we want to engage the public we need to use solution-focused messaging and avoid crisis language, because that only triggers apathy.

What have we learnt?

What next?

We are developing plans for a communications capacity building initiative. We are also talking to other funders about better ways to align funding to address future opportunities and gaps.



Inquiry into the Civic Role of Arts Organisations

Working with the arts sector to develop a strong and growing movement of arts organisations that embrace their civic role...

We want to enable arts

organisations to realise their potential for civic engagement, thus future-proofing their work by ensuring its social relevance in a changing world. This exploratory Inquiry is facilitating conversations on the civic role of the arts. Through research and consultation, we want to understand what it means now and support organisations to push boundaries. With partners across sectors, we will craft recommendations for policy change and practical support. Our ambition is to galvanise a movement of arts organisations committed to playing a civic role.

"Self-expression is all very well. Art is tougher, more purposeful, dangerous, and ultimately a means of change."

Ann Jellicoe, playwright, director and actor

Inquiry development and achievements

We published our report on Phase 1 of the Inquiry, *Rethinking Relationships*, and spent 2017 listening to the arts sector's reflections on this, to inform our plans for Phase 2. Four crucial elements for systems change have emerged: practice development, capacity building, funding and policy. The importance of professional development is a view shared by our colleagues in Lisbon: their PARTIS (Artistic Practices for Social Inclusion) programme draws the same conclusion. The Inquiry is now moving into Phase 2. This will include capacity building and prototyping in local areas.

Support summary: £139,601

The Inquiry is studying best practice from overseas. In Bulgaria, the Ideas Factory visits remote villages to capture songs and crafts close to dying out. (Photo: Ideas Factory)



Below: Rethinking Relationships explored the challenges and opportunities arts organisations face taking on a civic role. (Photo: Roswitha Chesher/Entelechy Arts)



Highlights

We have been delighted by the positive response to *Rethinking Relationships* from arts organisations – and their desire to engage in considering their civic role.

We extended the metaphors devised by the Inquiry Advisory Panel to encapsulate the civic role, adding 'temple' and 'home' to 'college', 'town hall' and 'park'. These metaphors have proved incredibly useful ways of helping organisations imagine their civic role in practice.

The sector has told us how helpful the 40 case studies we collected are in illustrating the potential of the civic role. They provide concrete examples of ways practice can be innovative and community-focused.

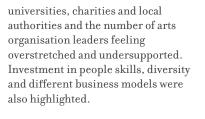
We have appointed an independent evaluator to help refine our Theory of Change and to develop and oversee our evaluation of Phase 2.

With major funders, including the Big Lottery Fund and the Arts Council England, we have begun conversations on how to foster a better funding ecology with greater collaboration between funders. By emphasising the civic nature of arts organisations, we hope our thinking will inform Arts Council England's next ten-year strategy.

We have had policy discussions with representatives from the Department for Culture, Media and Sport. We are commissioning Policy Lab to highlight further policy levers to target.

What have we learnt?

Rethinking Relationships revealed many challenges and opportunities for the sector. Key themes were the potential in working closely with bodies such as



What next?

Above: Case study organisations like Battersea Arts Centre share common features, including strong

leadership, commitment to artistic excellence, and integration with local communities. (Photo: Rob Logan)

We plan to publish a further 4.0 worldwide case studies by the end of 2018 and have commissioned an analysis of all 80 case studies. We will share a programme plan for the next stage of the Inquiry based on our findings so far and the views from the consultations.



The Inquiry is exploring 'cultural democracy': moving beyond an access model to enabling people to shape culture. (Photo: Linneah Anders)

Participatory Performing Arts

Widening participation in the performing arts to people from all walks of life, especially the most vulnerable and underserved communities...

good in life."

HomeAway performer

Strand development and

This strand is moving towards its legacy

ends in 2018. These productions mark a

successful funding collaboration with

the Esmée Fairbairn Foundation. We

have been sharing findings with our

Portuguese colleagues working on the

PARTIS (Artistic Practices for Social

Inclusion) programme.

phase. Our programme of innovative

co-productions, Sharing the Stage,

Shashane Parker,

achievements

We want to open up the performing arts. Through participation in the arts, marginalised people discover strengths, forge social connections, increase confidence and gain a voice. The creative process highlights what disadvantaged people can do, not - as so often - what they can't. In turn, encompassing diverse experiences enriches artistic works. Participatory practice is central to making work that combines artistic and social outcomes. Our ambition is to bring participatory performing arts into the mainstream.

Our Sharing the Stage co-productions are nearing completion, with eight finishing in 2017 and the final two in 2018. (Photo: Shelia Burnett/Geraldine Pilgrim)



Highlights

"All of us now know that We established a Learning Community we can be something for Sharing the Stage partners and other interested funders to share practice and discuss creative solutions. This year, this became self-managing,

> We are piloting an evaluation toolkit for participatory performing arts projects. Analysis will complete once all ten Sharing the Stage coproductions have finished.

ensuring its independent future.

We have filmed the journey of a nonprofessional artist from each of the Sharing the Stage co-productions. These documentaries act as compelling testimony and an innovative way of recording impact from performing arts projects.

What have we learnt?

Partnership and co-production require us to take a less directive role. We are taking this learning forward through the Inquiry into the Civic Role of Arts Organisations (see page 8).

What next?

The documentary films will be shared widely online in 2018. We are also eagerly anticipating publication of A Restless Art, a new book (in English and Portuguese) from celebrated arts and culture writer, François Matarasso.

Support summary: £320,842

Creating the Conditions for Change

Promoting social innovation, strengthening civil society and working to advance our own and others' philanthropic practice...

society respond when

so many things are

changing?"

Julia Unwin, Chair,

Civil Society Futures

What have we learnt?

Charitable foundations can take the

addressing future needs. Reflecting

on the past is one valuable tool for

long view. We want to maximise

impact by 'future-proofing'-

preparing for the future.

Our specific strands support different types of change cultural, organisational, corporate, policy or 'big system'. This cross-cutting strand underpins them by focusing on creating the best environment for innovative social change.

Highlights

We are co-funders of Civil Society Futures. This two-year Inquiry aims to develop a vision for civil society in England by 2030. It has set up a national conversation, through events, research and online debate. The Inquiry is hosting events and workshops across England during 2017-18 and facilitating independently hosted 'Conversations' based on an open-source format. It has issued an open call for evidence and published its first report, on trends and possibilities.

We are also co-funding the Social Change Project, led by the Sheila McKechnie Foundation, finding out what works in social change. This 15month initiative aims to create a vibrant, sustainable community of practice to help change-makers thrive. It has already identified ten 'burning issues' to explore further.

We backed publication of Generating *Change*, a book reflecting on lessons from forty years of Community Links, one of our first partners in a long history of supporting community development work.

What next?

With a number of other funders, we are helping ACEVO to build its membership, market its services better and be more accessible to small and medium-sized charities, especially those outside London and the South East.

Support summary: £87,437

Copies of 'Generating Change' (inset), the publication we funded which explores the 40-year history of Community Links (below), a groundbreaking organisation that we supported in its early years. (Photos: Tony Boyle)





Planning for Legacy

About the Foundation

To plan for legacy which maximises the ongoing impact of our current strands and to develop lines of enquiry that may form the basis of new priority strands in due course...

We seek to hand on the baton to advance work we have helped start. We produce learning publications, showcase projects to leverage funding and promote the policy change they seek, and support new networks or infrastructure. We also take our learning forward into our own new programmes.

Below: Entrepreneur Daisy Kateeba (left), 19, launched a clothing line for babies and toddlers, alongside skill-sharing events for young mothers. (Photo: Rob Logan)

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Highlights

We are delighted that The Agency – a creative programme for young entrepreneurs – has secured just over $\pounds 8_{73}, 000$ from the Big Lottery Fund to help it roll out nationally over the next three years. Modelled on the *Agência* project in Brazil, The Agency was launched in Manchester and London in 2013 with our support. It connects young people from underserved communities with both arts organisations and the business sector. This allows them to harness the approaches, networks and skills of both these vibrant industries.

With One Voice, connecting arts and homelessness practitioners worldwide, continues to flourish. It has mapped 160 projects in 21 countries and influenced the Manchester Homelessness Charter, the first city homelessness strategy to include a strong arts strand. It is reviewing how cultural spaces, such as arts centres and galleries, can better welcome and include people with experience of homelessness. This inclusivity is a theme of the Inquiry into the Civic Role of Arts Organisations (see page 8). With One Voice is planning its first global summit in 2018.

What have we learnt?

Connecting different sectors, allowing communities to take the lead and looking beyond our own borders for innovative solutions can produce remarkable results.

WHO WAS CALOUSTE GULBENKIAN?

Calouste Sarkis Gulbenkian was an Armenian born in Constantinople (near today's Istanbul) in 1869. He conducted much of his work in Britain, taking British citizenship, lived there and in France and finally settled in Portugal. He was influential in the early development of the oil industry. He was multicultural and multilingual and spent a lifetime bringing people together from different cultures and nationalities.

> Calouste Sarkis Gulbenkian.

> > The Foundation's headquarters in Lisbon.

WHAT IS THE CALOUSTE

On his death in 1955, Calouste

Gulbenkian left his fortune and art

private institution of public utility

extensively to Armenian causes he

humanity'. Its headquarters are in

(the UK Branch) and Paris. It has

assets of around €3 billion and an

annual budget of over €100 million.

Lisbon and it has offices in London

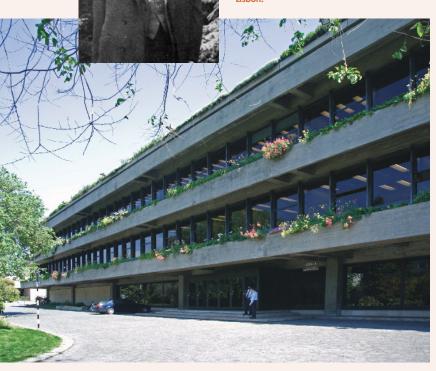
wanted his Foundation to benefit 'all

under an act of the Portuguese

Government. Although he gave

collection to a foundation set up as a

GULBENKIAN FOUNDATION?



WHAT WORK DOES IT DO AND WHERE?

The Foundation acts in four areas – arts, education, science, and social welfare – by giving grants and scholarships and through its own projects and initiatives. Most activities are in Portugal but the Foundation's impact is felt more widely and it is becoming increasingly international in fulfilment of its founder's wishes. It works extensively with other major European foundations.

In Lisbon, in addition to the museum containing the founder's art collection, the Foundation runs a modern art centre, an art library, an orchestra and choir. It also has an international science research centre.

From 2018-22, the Foundation in Lisbon has three main areas of focus: social integration, sustainability, and knowledge.

HOW IS THE FOUNDATION GOVERNED?

The Foundation is governed by a board of trustees, the majority of whom must hold Portuguese nationality. The founder's great-grandson, Martin Essayan, a British citizen, is now the third generation of his family to serve on the board. He is trustee for the UK Branch and for the Armenian Communities Department.

HOW CAN I FIND OUT MORE?

For further information, see our website: www.gulbenkian.pt or the linked website for the UK Branch, www.gulbenkian.pt/uk-branch.



Above: The London Agents in a project planning session at Battersea Arts Centre. (Photo: Rob Logan)





The Calouste Gulbenkian Foundation is an international charitable foundation based in Lisbon with offices in London and Paris. This Review highlights the work of its UK Branch across 2017 and into 2018.

At the UK Branch, our purpose is to bring about long-term improvements in wellbeing, particularly for the most vulnerable. Our current strands focus on preparing better for later life, promoting ocean conservation, and supporting arts organisations to fulfil their 'civic role'. This Review also shows our work on creating the conditions for change and securing the legacy of previous programmes.





Calouste Gulbenkian Foundation UK Branch 50 Hoxton Square London N1 6PB +44 (0)20 7012 1400 info@gulbenkian.org.uk www.gulbenkian.pt/uk-branch



Photos, clockwise from top left: Progress Film; Nik Gaffney/FOAM; Sara Teresa; Helen Murray; Nik Gaffney/FOAM