

WAB

The Blaggrave Trust 1981-2018 - Changing the Story

A short report

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Authorship and acknowledgements

This report has been written by Richard Hopgood and Ben Cairns, based on interviews and desk research carried out by the authors and by Houada Davis and Christopher Mills. Thanks to the trustees, staff and partners of the Blagrave Trust for giving up their time to take part in this project and for sharing their experiences and ideas so freely and openly.

Introduction

The Blagrave Trust ('Blagrave' or 'The Trust') is an independent grant-making foundation with a mission to enable disadvantaged young people (aged 14-25) to transition to adulthood successfully. It supports work in the counties of Berkshire, Hampshire, Wiltshire and Sussex, and funds some national strategic initiatives and policy work. It currently has an annual spend of £2m, drawn from an endowment of £40m.

For much of its 50-year history, it has been a relatively conventional and unobtrusive regional grant maker, operating along traditional lines with modest annual grants and the occasional larger grant. However, over the last six years (since 2012), it has undergone something of a transformation.

This report is a shortened version of a longer one commissioned by the trustees to tell the Trust's story, and focuses in particular on the last six years to share lessons learned, insights gained and the challenges that remain.¹

This short report does not go into detail about the myriad ways in which the Trust has evolved over the last six years, but depicts the recent history in broad brush strokes to convey the scale and drivers of change. Nor does it purport to be a blueprint, or a manual, but a story of how much can be changed with determination, urgency, strong leadership and a belief that: *'We can with our partners change lives for the better, if we accept the challenge and responsibility to put our beneficiaries at the centre of what we do and how we do it.'*

Part One: History 1981-2012

A brief history is given in Appendix One. The Trust started life in 1981 (upon the death of the testator, Herbert Blagrave) as a small regional funder offering one year grants, in the counties of Berkshire, Hampshire and Wiltshire, for work with handicapped children, the elderly, injured sportsmen and the sick. In 2009, the trustees sold the estate, which was the main endowment, in order to diversify the investments and enable the Trust to increase the distributable income substantially.

¹ As well as reviewing internal reports and other papers, IVAR interviewed Blagrave's trustees, staff and a selection of funded organisations ('partners') and other stakeholders. Interviewees' views and experiences are presented anonymously and are illustrated with unattributed quotations (indicated in italics). Where necessary, we indicate if opinions were expressed by a particular group.

Part Two: Remaking the Trust

With much more to spend (rising from £300k per annum to over £1m per annum), the three trustees thought the time was ripe for change:

'We had all got stuck in our ways: we needed a big shake up and it needed somebody with the energy, drive and commitment to do that.' (Trustee)

They felt they needed somebody *'young and experienced in the charitable world'*. In 2012, they appointed Jo Wells as the new Director. Jo had spent 17 years working for humanitarian organisations and arrived imbued with a particular set of values: a belief in partnership, the importance of advocacy and a genuine accountability to beneficiaries. Change was not immediate or radical; it started with a new tone and language, and a new sense of urgency.

Mutual trust was built and, critically, the new Director was given a licence to lead with the active support of the trustees. An early decision was taken to narrow the **Trust's area of interest to young people** and to drop the other themes. Over time, the strategic focus developed to its current articulation:

'Blagrove is aiming for sustained change, moving from individual support of young people to looking at more structural issues. We want to enable positive transitions for young people, whatever that means for them, focusing not on societal notions of "success" but on their own ambitions, quality of life, security and stability.' (Director)

Over the last six years, the Trust has developed a new way of working, which has a number of **distinctive "hallmarks" underpinned by overarching principles and ambitions.**

Learning from partners and young people

The Trust took on its new focus without any special expertise or experience in the area of young people, and with a Director new to the trust sector. An immediate challenge for the Director was how to learn about both, and, for the Trust, where to position itself. The key to this has been networking and seeking out opportunities for collaboration:

'It is important that funders don't lock themselves away in ivory towers. Blagrove staff go where the energy is and seek out people with similar values and priorities. A lot of learning comes from conversations and meetings.' (Funder)

Through discussions with people in the sector and consultants, the Director recommended that **listening to young people be placed at the heart of the Trust's strategy:**

'All youth work is relational, but what is maybe less normal about our focus, is its concern with youth voice and social justice. Giving young people a voice is fundamental to the performance of organisations – how can you say you are effective, if the people you serve are not fundamental to how you think about your strategy?' (Director)

The Trust sought out ways of listening to young people directly; encouraged and assessed how funded partners (grantees are named as **'partners' and accountability commitments** to them published) listened to the young people they worked with and acted on that listening; and, most recently, appointed young trustees. It also shared its learning with other funders and encouraged them to think about their own ways of working:

The idea that young people must be listened to and involved in decisions that affect them has been around for a long time. However, Blagrove have come along and said: "We need to do more than that: we really need to listen".' (Funder advisor)

It also sought to embed listening in its broader practice, seeking and giving feedback in a systematic and attentive way, commissioning feedback on its own performance and applying the principle in conversation with partners to enhance mutual honesty and effectiveness:

'Blagrove talk and listen to organisations and partners, so that they get their perspective on things. They don't come across as telling us what to do. They are influential but do not dictate agendas. They don't assume that grantees must follow a particular pattern or way of working.' (Partner)

Partnership and core funding

The new way of working embodies a fundamentally different way of relating to grantees, as noted above, **seeing and naming them as 'partners' and publishing a set of accountability commitments** to them on the Blagrove website.² This is intended to change the power dynamic of grant-making, where the funder traditionally holds the power:

'Blagrove put power on the table and shift it by sharing it. You can't be effective if you don't deal with the power dynamic.' (Consultant)

Assessments start with conversations and meetings rather than a paper trail. The expertise is acknowledged as lying with the partners, not the Trust, and the induction of new staff includes going to learn and work within partner organisations. As a corollary of this approach, and, in response to feedback, the trustees agreed to offer longer grants (normally for at least three years) and to favour unrestricted funding where practicable. This made the initial assessment focus much more on the whole organisation, rather than an individual project, with an emphasis on seeking a **different and deeper understanding of an organisation's work**:

'Blagrove want to understand how what they fund fits into the bigger picture. They like to have a continual conversation, to learn and to make improvements in implementing services. Blagrove are diligent and want to get involved. It's a two-way conversation and a partnership approach. It's much less transactional than most other funders.' (Partner)

To date, the Trust has repeat funded several partners and is now in a six-year cycle with them: *'We are already clear that we will maintain a longer-term commitment with the most impactful partners'*.

Collaboration

As a relatively small trust with a small staff team, it was quickly apparent that collaboration offered a means of doing things on a bigger scale – both financially and in terms of the expertise and capacity that other (generally larger) funders could bring. What is unusual is how Blagrove has collaborated with larger funders not as a junior partner, but as an equal. They have achieved this through the thoroughness with which they think things through and their willingness to lead and to act:

'Funders often say things and talk about how the world should be, but often don't do these things themselves. That's not the case with Blagrove though, as they are actually doing

² <https://www.blagravetrust.org/learning/commitments-organisations-fund/>

some really tough and challenging things. Their ability to form relationships, including those with larger partners, was founded on a high level of credibility.' (Funder)

The Trust ran a pilot (the Feedback Fund) and developed and leads The Listening Fund (launched in March 2018) in collaboration with three much larger funders (Big Lottery Fund, Comic Relief and Esmée Fairbairn Foundation).³ The £900k England Fund is supporting 22 youth-focused organisations throughout England to better listen to young people, and to respond to what they hear – ready to change how, when, and where they work; and even ready to change what services they deliver. The Scottish Listening Fund is about to launch, with Blaggrave supporting its development and bringing together the learning.

Joining the dots

In common with many other UK trusts and foundations, Blaggrave uses its convening power to bring partners and funders together to help build connections and enable serious discussion and learning. All trustees attend their annual partner meeting, although not necessarily other convenings.

For partners, the annual partner meetings have been very helpful, enabling them to come together with other organisations and make new links. Themes tackled in these meetings have included: evidence and learning in the youth sector; collaboration in the sector; an enquiry into the future of youth as part of the civil society enquiry; and reflections on accountability. For the Trust, what **distinguishes this particular approach to 'joining the dots'** is: *'Giving people the feeling they are on a search together'*; *'staying in the background and encouraging lots of conversations in the margins'*; and: *'trying to lead by ideas, without being preachy'*.

Working locally, acting nationally

Blaggrave has always been a regional funder, and continues to be so, while also funding national partners where this advances particular aspects of their work and provides the opportunity for learning and influencing: ***'We combine strategic policy, an emphasis on valuing the voice of young people, and funding work at the grass roots'*** (Director).

Working regionally brings advantages in many ways: a sense of communities and the local ecology of the sector; the opportunity to connect people in local networks and learn from and with them; and a sense of understanding the opportunities and challenges for young people in the context of place, rather than generically. Blaggrave has also taken account of the relatively modest amount of money it has to spend and the fact that, with devolution, a good deal of policy is locally specific, even if much power lies centrally. The decision to fund both regionally and nationally reflects all these factors.

³ <https://www.blagravetrust.org/listening/>

Part Three: Conditions for making change

Change requires more than new strategies and ways of working. For Blagrove, there have been a number of critical elements.

An appetite for change and a different kind of leadership

The trustees had an appetite for change, seeing that simply doing more of the same with more money would not do. This was critical in the decision to appoint Jo Wells, and to allow her to lead based on a high level of mutual trust. With good communication and consultation, and a clear focus and mission, the trustees have felt more involved than under the old model: *'The trustees know more [than in the past] about what's going on and understand that, with more to give, there is more responsibility and a greater need for knowledge. As times have changed, we have changed. Now we are quite knowledgeable and proactive'* (Trustee).

Building internal capacity and diversity

As the Trust has developed a different way of working, it has needed to build its capacity by expanding its internal team to the current four. Critical to this has been recruiting staff who have experience of working on the front line in operational charities and in the youth sector. Expansion also helps to dilute dependence on the Director who is, for many people, *"the face of Blagrove"*.

The Trust has also needed to expand its Board. For the first 30 years of its life, Blagrove had three male trustees whose skills lay in the field of investments, property and law. The new leadership and the start of big changes helped to prepare the way for building diversity into the Board. First, two female trustees, with extensive experience of philanthropy and grant-making, were appointed. Then, in 2017, the trustees agreed it was essential to appoint young people to the Board: *'This is a matter of generational equity and also because they have a more direct take on how young people are thinking and understand the culture of social media, etc.'* (Trustee). Two new trustees took up their appointments in early 2018 on initial three-year terms; both felt during the appointments process that the Trust was very receptive to new ideas and change, and that they would be listened to and could make distinctive contributions.

Relationships magnify what you can do

As a small trust, Blagrove has been able to magnify greatly the scale and potential impact of its work through connecting its partners and collaborating with funders: *'New models can be co-funded in ways which increase their financial size and scalability, add capacity in the staff and skills of co-funders and broaden the branding - all "amplifying"'* (Trustee). Forming and developing these relationships has been critical to **shaping the scale and depth of the Trust's work.**

Learning drives action

For Blagrove, the point of learning is to make better decisions and to work more effectively, sometimes by taking action to influence others to act. It is informed by a sense of urgency about the issues that are being addressed – it is not learning for its own sake.

Being smaller creates its own opportunities (agility)

Trusts and foundations have often tended, whether consciously or not, to expect ambitions to be determined partly by the size of the endowment and annual spend. If you are big, you can have **big ambitions and do big things; and if you are small ...**

Of course, the reality is often different, but it is still a surprise to many that a trust of Blagrove's size, with a **current spend of £2m per annum**, can become a **"serious" player in the youth sector and partner** much larger trusts in a leadership role, as it is doing with The Listening Fund. Being small has been no bar to ambition. It has enabled Blagrove to be agile and decisive.

Engaging directly with your beneficiaries

Blagrove respects and harnesses the expertise and experience of its partners. It seeks to support them to improve their practice and, in particular, to know what good listening looks like. In addition, the Trust engages with and listens directly to young people, e.g. **young people lead the Trust's** partner meetings, act as keynote speakers, participate in local youth commissions with whom the Trust meets, and drive pieces of work via a growing network of young people from outside the **Trust's partners**. The engagement is direct and unmediated: *'They are always keen to get closer to the communities [they] serve. You cannot get a sense of the reality of beneficiaries' lives if you restrict yourself to second hand reports'* (Consultant).

Part Four: Building an ethos for change

In six years, Blagrove has transformed itself from a modest local grant maker, casting its bread upon the waters, to an organisation determined to make a real and lasting difference for, and with, young people. In almost every respect, it has changed – in its focus, its ethos, its relationships, its processes and its influence. It has harnessed a moral imperative – a sense of urgency – to do what it feels is right and necessary, rather than what is conventional. The Trust is driven by a passionate sense of the struggles that many young people face; and a view that grassroots organisations and young people themselves hold the key to social change and that funders operate within and are part of a system that requires them to look outwards. This, in turn, has given it the courage to change itself.

Blagrove has developed a distinctive culture in how it goes about its work. The new "model" is equally a new culture. This is the most important part of change, because it binds people together and sustains an organisation beyond changes of personnel and circumstance. Blagrove also has a positive approach to risk. It funds not transactionally but relationally, within partnership. It relies for its intelligence on conversations and meetings; its own observations; and the independent judgements of others. Its relationships and actions are based on the principle of trust rather than suspicion. As an expression of this, core funding gives partners the flexibility to decide their own spending priorities. If things go wrong, or diverge from what was predicted or expected, the response is not to castigate but to learn. Moreover, there is an expectation that things sometimes *will* go wrong and that the important thing is to recognise this rather than – as can happen within a more transactional culture – to allow it to be ignored or glossed over:

'The key thing is a real appetite to try things. Some will probably fail but you can learn from failure. We are honest about what does not work. Listen, learn, and don't be scared to make mistakes. We've had lots of setbacks, but we all learn from mistakes.' (Trustee)

Part Five: Challenges and work to be done

Achieving policy influence from a small base

The Trust wants to see positive structural changes, both in its work with young people and among funders. It wants to influence and change public policy and practice. To that end, it has appointed a new member of staff to resource its policy work. This will require building coalitions to achieve critical mass; building a strong evidence base; and, in a crowded space, identifying and leveraging **the Trust's USP. It also requires immense patience and tenacity** – as Ministers come and go, and electoral and financial cycles wash over the best-laid plans – and sometimes simply being in the right place at the right time. Thriving in this arena – crowded and unpredictable as it is – will also require luck, as well as a heavy dose of realism about what can be achieved with very limited (human) resources. **The Trust's vehicle of policy influence may well be about the process of policy change and how that happens and who is involved, i.e. it will fund youth-led activism and campaigns and work that gives young people a voice, rather than being issue and adult-led.**

Tension of local and national

Whether an ambition to influence national policy is achievable within a largely regional framework of grant-making remains questionable and is a question the Trust is actively debating. Likewise, the extent to which learning from regional partnerships is circumscribed by its localism, and if, and or how, a regional approach might limit the connections and new relationships that Blagrove could make in support of its objectives. The answer may not be an either/or, but simply one of conscious and deliberate balance.

There are examples of other regional funders who have managed this balance successfully, but they have generally been much bigger than Blagrove (The Northern Rock Foundation is an obvious example⁴). The key here may be the extent to which Blagrove can continue to leverage its own capacity through collaboration in national initiatives such as The Listening Fund.

Learning to build evidence

Blagrove's style of learning has been more intuitive than systematic. Soon the time may come for a different approach, if the evidence base for change is to be made (something already recognised internally), particularly when target audiences for influence (e.g. government agencies) may listen more keenly to particular kinds of data. This is likely to have cost and capacity implications.

Testing new boundaries

Blagrove's Board has unity of purpose within a diversity of views. So far, differences of view have not disturbed that unity of purpose, but inevitably, there will be some issues that may prove more divisive. Preparing and allowing for thorny questions of identity and direction will be critical. The open and reflective approach with its partners encouraged by the Trust will be a good model for working through difficult issues.

Embedding change beyond individuals

The Director has led the process of change and transformation, but the new model needs to be sustained beyond any one individual. It requires both strong governance and a strong staff team, who share the same values and ambitions. The Director herself is keenly aware of this: *'Maybe we*

⁴ IVAR (2014) *Being There: Northern Rock Foundation's approach to resourcing grant making*, London: IVAR

should have maximum terms for CEOs. These are privileged jobs and it is easy to stay too long – I could just put my feet up for another five years. CEOs need to consider when they need to move on and let somebody with different skills and energies take over. That would also introduce more movement at the top in the trust world’. However, there is confidence within the Trust that the changes that have been made are sustainable and irreversible.

Continuous evolution

The Trust continues to evolve, and is committed to being agile and adaptive, as enshrined in the Charter the Board agreed in mid-2018. At the time of writing, and in this spirit, significant further thinking has gone into how the Trust can move from being a youth-focused funder to a youth-led Trust – that is, mirror its values to shift power and model alternative philanthropic models by evolving its governance to include more young people, and to funding youth-led campaigns in its policy work.