

# LOOKING TO THE FUTURE, LEARNING FROM THE PAST:

HOW NGOS CAN BE BETTER PARTNERS TO TRUSTS AND FOUNDATIONS

OXFAM EXISTS TO END POVERTY BY HELPING PEOPLE FIGHT  
IT TODAY AND ROOT OUT ITS CAUSES FOR TOMORROW



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# PROJECT METHODOLOGY



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# THE PROCESS & PROJECT METHODOLOGY

1

## PHILANTHROPY INSIGHT

- Building on audience insight developed in 2017 by interviewing 40 philanthropists and philanthropy experts

2

## IN-DEPTH INTERVIEWS

- 25 depth interviews with individuals across the sector, including Trustees, Grant Managers and CEOs
- The interviews were an even split of Oxfam supporters and non-supporters from a range of organisations of varying sizes and types

3

## ANALYSIS

- Detailed qualitative analysis of interviews and coding of interview transcripts. What are our stakeholders telling us? Where are the common themes? Taking a step back to look at wider trends and implications for INGOs, including Oxfam

4

## SHARING AND IMPLEMENTING

- Sharing findings across Oxfam, with interviewees and the wider sector
- Building recommendations and action plans collaboratively with key stakeholders to implement and embed the findings

# SECTOR PRIORITIES



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# PROGRAMME, NOT PROJECT



CREDITS: AURELIE MARRIER D'UNIENVILLE & TINA HILLIER/OXFAM

- Sustainability and scalability are clear priorities for the Trusts and Foundations sector. There is a clear ambition to create permanent, sustainable change, far beyond the life of one project.
- Many Trusts and Foundations are now more interested in funding a programme or investing in a partner organisation than supporting shorter-term, standalone projects.
- In addition to creating sustainable programmes, Trusts and Foundations want to work with grantees to help the organisations themselves become more self-sustaining.
- Both projects and programmes are viewed in the context of other relevant work and progress in the sector.

*“So what I’d love is for every partner to understand... how is this initiative along with other things happening in the industry really going to make a change? What needs to happen after we’re gone and maybe even they’re gone? That longer-term view, I think we need to spend more time maybe thinking about that, so that we can design the right short-term intervention.”*

- Director

# IMPACT



CREDIT: RACHEL CORNER & ABIR ABDULLAH/OXFAM

- Trusts and Foundations have a nuanced understanding of impact, which is not limited to the success of projects they fund, but includes lessons learned from failure.
- These funders are very aware of the challenges of measuring impact, particularly in social change, in both the short and long-term.
- A number of Trusts and Foundations have developed or are developing their own impact metrics, which allow them to report consistently on their impact and provide a baseline against which to measure and evaluate whole funding portfolios.
- Focus is shifting from outputs to outcomes – what matters is how a project or programme is creating the change the funder wants to see in the world, rather than demonstrating that all planned activities have been delivered.



*"I see a definite trend for – not just in our organisation, but other foundations – moving beyond 'did you do what you said you would do with the money?' You know, the specific activities, to really moving beyond that to, 'well, what change do you think happened because of that work, or that output?'"*

- Grant Manager

# GATHERING LEARNING

- Learning is integral to the sector. Trusts and Foundations are continuously learning and adapting, and expect to see grantees doing the same.
- Funders do not expect everything they are working on to go according to plan and understand that grantees may face difficulties or need to change tack.
- Grants should instead be seen as opportunities to learn and improve together.
- Learning shouldn't just be gathered at the end of a project but throughout.
- Grantee reporting is an opportunity to evidence what learning is being gathered and how implementing partners are using that learning to improve programmes.



CREDIT: TESSA BUNNEY/OXFAM

*“If somebody actually turns up as a genuinely learning organisation which actually genuinely uses data to make a difference to what they do, you know one just sighs a deep, profound sigh of relief... and gets very excited.”*

- Director

# IMPLEMENTING & SHARING LEARNING

- It is essential for grantees to document and demonstrate the application of their learnings – what has changed as a consequence? How will that be implemented to improve future programmes?
- As well as gathering and implementing learning to build their own expertise, Trusts and Foundations are increasingly looking to put this knowledge to wider use. For example, to prevent duplication or the same mistakes being made repeatedly across the sector.
- Many in the sector are considering how best to leverage the impact of the work they have funded by making the lessons they have learnt available to others.



CREDIT: JOHN FERGUSON/OXFAM

*"We're looking for a real commitment to learning through the grant, the lifetime of the grant, to feeding that learning back into practice, but also to helping sharing that learning more widely. And increasingly we're seeing ourselves as having a role to play as a disseminator of knowledge and learning."*

- Director



# BUILDING TRUST THROUGH TRANSPARENCY

- Trusts and Foundations are aware that the need for funding may impact a grantee's transparency when projects don't go to plan.
- Those working within the sector are experts and very often have direct field experience. They are realistic that things will inevitably change from the original proposal.
- In addition to advancing learning, honesty and open conversations with funders can go a long way in building trust and creating a more effective partnership. Attempts to hide or gloss over problems inevitably result in suspicion.



CREDIT: DAN MEDHURST/OXFAM

*"I can't stand it when I talk to partners that are like, particularly you know 'everything's fine, everything's going well, everything's perfect'; and um yeah, it's like – that just cannot be the reality. Nothing runs perfectly."*

- Grant Manager

# SECTOR TRENDS



CREDIT: ABBIE TRAYLER-SMITH//OXFAM

# AERIAL VIEW

- Trusts and Foundations define their own roles and strategies. Although these self-defined roles varied across the organisations interviewed, the value of the convening power of these funders, to bring together implementing partners, was widely recognised.
- Several Trusts and Foundations spoke about their unique vantage point as funders. Unlike partners on the ground, they can see the bigger picture, and identify connections between organisations working on similar issues.
- There is frustration at the lack of knowledge sharing, conversation and collaboration between charities.



CREDIT: ANDY HALL / OXFAM

- This led to Trusts and Foundations taking steps to connect organisations and encourage them to work in a more joined-up way.

*"You know, we have a very privileged position... particularly as grant-makers, where you're kind of flying at a level where you see quite a landscape of different things happening, and you see connections between these things. And actually it's not us that need to see that, it's those organisations on the ground."*

- Director



# STRATEGIC ALIGNMENT

- It is important to Trusts and Foundations to understand the wider context of the work the fund, and the organisation that they are partnering with: how does this programme fit into their grantee's strategy and goals? Does the grantee have effective leadership? What else is happening on this issue across the sector?
- Trusts and Foundations want to work together with grantees, towards a shared goal. However, this must be genuine: they do not want grantees to 'pander' to their aims, in order to secure for funding.



CREDIT: AURELIE MARRIER D'UNIENWILLE/OXFAM

*“Our finding is that when we’ve shared even portions of it [our strategy] with grantees, the next proposal that comes in just has verbatim our own text in it. And we don’t want to see organisations work to our goals. We want them to have their own goals that happen to fit with us.”*

- Grant Manager

# SECTOR NETWORKS

- Whether formally or informally, Trusts and Foundations are regularly connecting to share learning and expertise.
- Trusts and Foundations share experiences and seek feedback and recommendations from other funders to get an impartial view. There is a lot of trust between peers in the sector.
- Listening to communities and local partners has increasingly become an important part of the decision-making process for the sector.
- These formal and informal conversations are a useful way for funders to check the quality of their potential grantees and find out who else is working in their strategic areas.



CREDIT: DAN MEDHURST / OXFAM

*"If we see they are funded by a funder we know then we just drop them an email to say 'hey, what about this lot, what do you think?'"*

- Director

# BIG AND SMALL



CREDIT: ALLAN GICHIGI/OXFAM



# SMALL AND LOCAL ORGANISATIONS

- Local partners were viewed favourably by the sector as flexible, innovative and willing to learn. They were also seen as the authentic voices, with a greater awareness of reality on the ground and the local context.
- Trusts and Foundations understand the vulnerabilities and limitations of smaller organisations and are willing to be work more flexibly with them.
- In order to prevent smaller organisations from becoming overly reliant on funding from a single donor or small pool of donors, Trusts and Foundations often fund core costs and capacity-building to increase a grantee's' future sustainability.



CREDIT: NANA KOFI ACQUAH/ OXFAM

*“The experience we’ve had, is that it is easier with smaller organisations... There we have the impression and the experience that our contact person is much closer to the actual project. As soon as the organisations become larger ... then it depends very much how the communication channels are set up, whether the document crosses many desks or whether we can find a way where the documents cross less desks until they reach us.”*

- Director

# LARGE ORGANISATIONS AND INGOs

- Large INGOs are seen as further removed from programme than local partners. They can sometimes be seen as an extra or unnecessary link in the chain of communication, bureaucracy, and flow of money and information.
- Large NGOs were often seen as generalist, and less expert than smaller specialist organisations.
- However, Trusts and Foundations recognise that the value of large organisations and INGOs is their scale and ability to replicating projects, and their reach and influence in advocating for change.



CREDIT: SAM TARLING/OXFAM

*“Each of your topics could be an organisation on its own. It’s like you start to be a bakery, and now you are a retailer where there is the butcher, the bakery, the drugs, the clothes, the shoes, now you start to have some bags, soon you get the petrol station there as well... So it goes from one or two fruits to a fruit salad, and at the end you have a whole grocery store. And that’s probably the biggest problem.”*

- Director

# CONCLUSIONS



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# THREE GROUPS

From the interview data we have created a model which identifies three broad categories within the Trusts & Foundations sector. These groups are defined by organisational structure, funding approach and expectations of partner organisations.

There is no perfectly neat and way to categorise the diversity of the sector, and like any model, there will always be outliers. Trusts and Foundations can move from one group to another, or may have elements of more than one group.

However, we have found it a useful framework to understand the key motivations, expectations and approaches of our partners.



CREDITS: JANE BEESLEY/KIERAN DOHERTY/BETTY PRESS/OXFAM



# CURRENT MODEL

	GROUP 1	GROUP 2	GROUP 3
<b>INDICATOR</b>	<i>"My role in making a difference is the funding I provide"</i>	<i>"I can provide more than money"</i>	<i>"I want to work in partnership to achieve a shared goal"</i>
<b>FUNDING</b>	<ul style="list-style-type: none"> <li>Funds standalone projects if they meet the aims of the Trust or Foundation.</li> </ul>	<ul style="list-style-type: none"> <li>Has focused core funding areas.</li> <li>Funds multi-year projects that meet their organisational aims.</li> </ul>	<ul style="list-style-type: none"> <li>Ambitious, long-term goals.</li> <li>Invests in both programmes &amp; organisations e.g. core costs, capacity building.</li> </ul>
<b>INVOLVEMENT</b>	<ul style="list-style-type: none"> <li>High trust in grantees to deliver.</li> <li>Low level of involvement in the delivery of the programme.</li> </ul>	<ul style="list-style-type: none"> <li>Collaborate on project design through the proposal process.</li> <li>Provides additional non-monetary support.</li> </ul>	<ul style="list-style-type: none"> <li>Greater design and implementation collaboration with grantees.</li> <li>Provides additional non-monetary support.</li> </ul>
<b>PARTNERS</b>	<ul style="list-style-type: none"> <li>Reactive funding approach.</li> <li>Commonly funds big, trusted names and smaller organisations with a connection to the Trust or Foundation.</li> </ul>	<ul style="list-style-type: none"> <li>Both proactive and reactive in seeking appropriate proposals.</li> </ul>	<ul style="list-style-type: none"> <li>Proactive in searching for partners with shared goals.</li> <li>Convenes potential grantees and partners.</li> </ul>
<b>STAFF</b>	<ul style="list-style-type: none"> <li>Often led by Trustees, with limited additional staff.</li> </ul>	<ul style="list-style-type: none"> <li>Operational decisions delegated from Trustees to a small team of staff.</li> </ul>	<ul style="list-style-type: none"> <li>Has a larger number of staff with autonomy over decision-making.</li> <li>Employs staff with expertise in specific focus areas.</li> </ul>
<b>MEASURING PROGRESS</b>	<ul style="list-style-type: none"> <li>Not prescriptive in reporting requirements.</li> </ul>	<ul style="list-style-type: none"> <li>Have own reporting requirements for grantees.</li> </ul>	<ul style="list-style-type: none"> <li>Regular communication and updates with partner in addition to formal reports.</li> <li>Alternative evaluation methods, e.g. grantee surveys.</li> </ul>

# BLURRING LINES

Trusts & Foundations are moving into spaces traditionally associated with charities and NGOs, such as employing experts with strong field experience, and working directly with local partners. The lines are increasingly blurring between the roles of Trusts and Foundations and INGOs.

Trusts and Foundations are uniquely resourced, informed and skilled. They are able to take risks and new approaches that are off-limits to other funders which may face more public scrutiny. These organisations are changing the rules of engagement with grantees and local implementing partners.



CREDIT: TOMMY TRENCHARD/OXFAM

# MODELLING THE FUTURE

## TWO FUTURE SCENARIOS

Using the partnership approach framework, we outline two potential future scenarios for the sector:

Future scenario 1: true partnership and co-creation, combining the strengths and expertise of both funder and grantee.

Future scenario 2: Trusts and Foundations bypass NGOs entirely.

## ONE KEY PRINCIPLE

Every donor has different priorities, aspirations, and skills. The key to establishing the strongest partnerships is identifying a project or programme in which the implementing partner's priorities, aspirations and skills align with that of the donor in a complimentary way.

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# FUTURE SCENARIOS

	<b>FUTURE SCENARIO 1</b>	<b>FUTURE SCENARIO 2</b>
<b>INDICATOR</b>	<i>"Let's create an equal partnership using both of our expertise"</i>	<i>"The NGO is a middle-man that we will skip"</i>
<b>FUNDING</b>	<ul style="list-style-type: none"> <li>• Money is not always exchanged in the partnership.</li> </ul>	<ul style="list-style-type: none"> <li>• Gives directly to local partners, avoids large charities and INGOs.</li> </ul>
<b>INVOLVEMENT</b>	<ul style="list-style-type: none"> <li>• Programmes designed in partnership.</li> </ul>	<ul style="list-style-type: none"> <li>• Trust &amp; Foundation takes on role of programme implementer.</li> </ul>
<b>PARTNERS</b>	<ul style="list-style-type: none"> <li>• Agree on issue areas together; utilises skills &amp; resources of both organisations as equal contributors.</li> </ul>	<ul style="list-style-type: none"> <li>• Trust &amp; Foundation convenes relevant organisations to implement programme.</li> </ul>
<b>STAFF</b>	<ul style="list-style-type: none"> <li>• Uses expert staff with the relevant skills, whichever organisation they belong to.</li> </ul>	<ul style="list-style-type: none"> <li>• Employs own staff required to carry out programme.</li> <li>• Takes things to scale using own networks.</li> </ul>
<b>MEASURING PROGRESS</b>	<ul style="list-style-type: none"> <li>• KPIs and reporting agreed and measured together.</li> <li>• Learn together and adapt accordingly.</li> </ul>	<ul style="list-style-type: none"> <li>• Independent reporting &amp; metrics.</li> </ul>

# APPLYING THE INSIGHT



CREDIT: TOMMY TRENCHARD/OXFAM

# RESPONDING TO A CHANGING LANDSCAPE

The Trusts and Foundations sector is changing and the traditional lines between funder and grantee are starting to blur.

As a large INGO we need to respond to the changing landscape to ensure our experience and expertise does not become irrelevant to the sector. For example:

- Collaborate and share expertise, both with funders and other implementing organisations
- Demonstrate the unique additional value that the organisation brings
- Articulate clear priorities and goals
- Better understand and meet the needs of funders



CREDIT: TEGID CARTWRIGHT/OXFAM



# APPLYING THE INSIGHT: EXAMPLES



## TRANSPARENCY

## CLOSER LINKS TO PROGRAMME

## MAPPING OUR STRENGTHS

## LEARNING

- Fundraisers are committed to regularly sharing more information with our supporters, and reports will focus on learning.

- A new team launched in November 2018 within Philanthropy & Partnerships will create stronger links with Oxfam's country and programme teams.

- The Philanthropy & Partnerships team are undertaking a project to clarify Oxfam's key strengths, as well as where we could most benefit from the different skills of our partners.

- Oxfam's Trusts and Foundations team will host a series of learning events in 2019, sharing our experience partnering with supporters such as IKEA, and on topics such as Monitoring Evaluation and Learning.

**OXFAM IS COMMITTED TO LISTENING, LEARNING AND IMPROVING.**

**TO CONTINUE THIS CONVERSATION, OR TO HEAR ABOUT OUR LATEST WORK, PLEASE GET IN TOUCH. WE WOULD BE DELIGHTED TO HEAR FROM YOU.**

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**WITH THANKS TO ALL PARTICIPATING ORGANISATIONS,  
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Asfari Foundation

C&A Foundation

Cartier Philanthropy

Good Energies

Joseph Rowntree Foundation

Latin American Children's Trust

Paul Hamlyn Foundation

Poul Due Jensen Foundation

Small Foundation

The Waterloo Foundation

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