

Paul Hamlyn Foundation

Yearbook 2011/12



Cover:

Year 10 students from the Canterbury Academy on a one-week residential to boost attainment in a range of subjects across the school curriculum. This and other residential models have been developed as part of Learning Away, a Special Initiative of the Education and Learning programme. (See p. 25)

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Chair's statement

Reflection and strategic development

This year, through all our programmes, we have sought ways to meet the needs of grantee organisations that are facing challenges in the current economic environment and by supporting organisations that help individuals and communities to realise their potential and maximise quality of life.

We have always worked hard to try to understand the impact of our work but this past year we have committed considerable time to analysing our impact over several years. The theme of impact and evaluation recurs within this Yearbook, and will come to shape our activities more as we look ahead.

In this Olympic year we are conscious of the many large public arts initiatives taking place through the Cultural Olympiad. This celebration of the arts in the UK is a powerful reminder of art's benefit to people and communities.

We were pleased to announce in March our decision to increase our funding for individual artists and composers through the PHF Awards for Artists. Our contribution in this area is based on our belief in the value of the artist to society, and it is important for us to be supporting a group of artists through difficult economic times.

Our move to Leeke Street in February was based on our wish to increase capacity for convening grantees and sharing learning – ways in which we believe we can increase the impact of our support and be more inclusive as an organisation. After 18 years at our old offices, the move marked a big change for the Foundation. Buying, refurbishing and then moving into the new building were complex operations, overseen superbly by Lucy Palfreyman, our Director of Finance and Resources.

The year 2012/13 will hold particular significance for us as it marks 25 years since the Foundation was first established. We will be marking the occasion by making a small number of gifts to organisations which we know deliver significant change to individuals' lives, through offering cultural experiences and learning opportunities to a broad cross-section of society.

We are also marking the anniversary by publishing 'Paul Hamlyn: An Oral History', an audio documentary drawing on a collection of interviews with many of my father's close friends, colleagues and associates. Camilla Whitworth-Jones, a former colleague at the Foundation, has managed this project with exceptional dedication. It has been produced by Marilyn Harris.

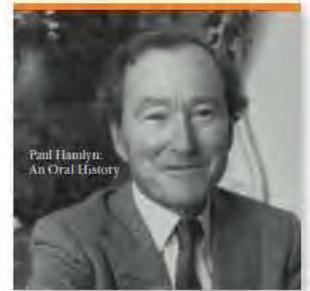
We were saddened to hear the news of the death of James Cornford, who was Director of the Foundation from 1994–97. Some of our staff have been with us long enough to have worked with James, and we will remember him, and his contribution to the Foundation's development, fondly. One of those long-serving members of staff, Fatima Joaquim, retired at the end of 2011, and I thank her for her work over many years.

Another departing colleague is Shankar Venkateswaran, advisor to our India programme, who stood down during the year to lead the Sustainability and Climate Change practice for PricewaterhouseCoopers in India.

We are pleased to be joined by a new trustee, Beeban Kidron, the respected film director. Her work in the arts over many years, and her establishment of the educational charity FILMCLUB, will make her a valuable board member and we look forward to working with her.

My thanks go as ever to the trustees who give so much of their time and expertise, and to the Director and staff for their outstanding commitment.

Jane Hamlyn
Chair



Cover artwork for 'Paul Hamlyn: An Oral History'. The audio documentary is also available on our website

Paul Hamlyn Foundation

Paul Hamlyn was an entrepreneur, publisher and philanthropist, committed to providing new opportunities and experiences for people regardless of their background. From the outset, his overriding concern was to open up the arts and education to everyone, but particularly to young people. In 1987, he established the Paul Hamlyn Foundation for general charitable purposes.

Since then, we have continuously supported charitable activity in the areas of the arts, education and learning and social justice in the UK, enabling individuals, especially children and young people, to experience a better quality of life. We also support local charities in India that help the poorest communities in that country get access to basic services.

Paul Hamlyn died in August 2001, but the magnificent bequest of most of his estate to the Foundation enables us to build on our past approaches.

Mission

To maximise opportunities for individuals and communities to realise their potential and to experience and enjoy a better quality of life, now and in the future. In particular, we are concerned with children and young people and with disadvantaged people.

The objects of the Foundation are to further such charitable purposes and to benefit such charitable institutions as the trustees see fit.

Values

In line with our founder Paul Hamlyn's values, we believe in giving opportunities by realising people's potential and in fighting prejudice.

We are interested in finding better ways to do things and help organisations to sustain and develop their work. We pay particular attention to long-term issues. We are not afraid to address issues which others may find challenging or unpopular. Whilst being willing to work in partnership with government, we are also prepared to challenge its (and other people's) established thinking. We believe independent foundations have an important role to play in society.



Arts programme – page 8
Enabling people to experience and enjoy the arts



Education and Learning programme – page 20
Developing people's education and learning

Strategic aims

Our strategic aims are:

1. Enabling people to experience and enjoy the arts.
2. Developing people's education and learning.
3. Integrating marginalised young people who are at times of transition.

In addition, we have three related aims:

4. Advancing through research the understanding of the relationships between the arts, education and learning and social change.
5. Developing the capacity of organisations and people who facilitate our strategic aims.
6. Developing the Foundation itself to be an exemplar foundation, existing in perpetuity.

Programmes

We seek to achieve our first five aims by establishing three partly overlapping programmes for our work in the UK: arts; education and learning; and social justice. Themes and priorities within each programme may change over time. Each of the three programmes has an Open Grants scheme and Special Initiatives, the latter targeted at issues we particularly want to address to achieve long-term improvements in society. We have a separate programme for our work in India.

We expect the programmes and the work we support to have an impact at the levels of individuals and communities, organisations, and policy and practice.

Grant-making information

Full information on the objectives of each programme, their themes and priorities, eligibility and assessment criteria, application and grant-making processes is available on the Foundation's website. Eligible applicants are asked to send online a first-stage application to the Foundation. For further information, please see www.phf.org.uk



Social Justice programme – page 32
Integrating marginalised young people at times of transition



India programme – page 42
Supporting NGOs in India, with a particular focus on women and children

Director's report

Developing our impact

We published our current strategic plan in November 2006. This Yearbook is the sixth we have produced under that plan, and in November 2012 we will be publishing a report on the impact of our work during this period. This includes both the work of the organisations we have funded and the Special Initiatives we have carried out, in partnership with others.

Our strategic plan was due to end in 2012 but trustees have decided to roll it forward, recognising the need to reflect fully on the impact of our work, and also to give further time for the changes introduced in the light of the mid-term review of our plan to bed down. We have decided to repeat in 2013 the Grantee Perception survey which the Center for Effective Philanthropy carried out on our behalf in 2009/10. This will also help to inform our future thinking.

The information about the impact of our grants and activities will also become a key part of the way in which we fulfil the legal duty placed on all charities to report on the benefit they provide to the public. The Foundation as a charity benefits from a reduced tax bill, which is a further reason we report as fully as possible on how we deliver public benefit. Though the attribution of cause and effect for grant-making foundations is a challenging area, our work this year will provide the most detailed picture to date of our overall impact.¹

Published findings

In other respects, 2011/12 was a big year for research and learning at the Foundation. Our Special Initiatives are always informed by the research we carry out before we implement activity, and in most cases they are also underpinned by a theory of change. This year we commissioned independent research on girls and the criminal justice system, which we hope will form the basis for a future Special Initiative. We also commissioned (jointly with the Baring and Nuffield foundations) the Centre for Charitable Giving and Philanthropy at Cass Business School to review UK foundations' funding for international development, which was published as 'Global grant-making'.²

Under our Learning Futures Special Initiative we published a range of leaflets detailing methodologies and approaches to teaching and learning developed during the programme. Ongoing management of this work will pass to the Innovation Unit, our partner in Learning Futures' development, during 2012/13, from where we expect these findings to continue to reach new audiences and have continued impact. The year also saw the final stages of development for a report on the findings of our What Works? initiative, also under the Education and Learning programme. The findings offer powerful insight into how young people can be supported to continue in higher education and maximise their potential.

I am grateful to David Carrington for his contribution to this Yearbook. Based on investigations into the role of research and learning by foundations in the UK, his insightful article places our own efforts in a wider context.³ He is a leading member of a small team that has undertaken a research initiative of the European Foundation Centre (EFC) whose aim is to enhance the role of learning and research within foundation practice in Europe. The research findings were launched at the annual conference of the EFC which took place in June 2012 in Belfast. The conference was supported with a contribution from PHF.

Resilience

We are aware of the challenges faced by many organisations in a difficult funding climate – a theme echoed across each of our UK programme reports in this Yearbook. We continue to monitor the impact of the changes likely to result from the provisions of the Localism Act 2011 and the Government's Big Society initiative.

1 An article on the processes of our impact measurement is included on pp. 48–49

2 All our published reports can be viewed online at www.phf.org.uk/publications

3 See pp. 6–7

We know that foundations' funding of organisations can provide vital stability. While most of our grants are awarded for up to three years in the first instance, we have long aimed at increasing the level of follow-on funding to enable us to see through work that we know to be having a positive impact, and to support organisations we know to be doing good work to continue. Our Open Grants portfolio this year shows increased spending on these areas, across our three UK programmes.

We have also continued to develop our non-monetary support. This year we developed further the documents we issue when making a grant through our Open Grants schemes, including revised guidance on reporting and a new 'relationship agreement', designed to set the mutual expectations for engagement after the confirmation of a grant. It underpins the joint process of setting outcomes for the funded activity, and defines ongoing contact through the life of a grant.

We believe these are important developments for ensuring consistency across our grantee relationships and for helping us to deliver enhanced value to the organisations we support – with the ultimate goal of securing greater gains in life chances for the individuals with whom they work. Full documentation is available from the Grant holders section of our website.

A further strategic aim of the Foundation is to support the wider philanthropic sector through our activities. Our Director of Finance and Resources, Lucy Palfreyman, was in February elected chair of the Finance, Investment and Resource Management Network, which consists of finance directors from large UK foundations. The group discusses emerging issues concerning various functions within foundations. Lucy, with some colleagues from the group, commissioned and oversaw the publication of a report by Richard Jenkins, 'The Governance and Financial Management of Endowed Charitable Foundations', published by the Association of Charitable Foundations.

We continue to seek to reach as broad an audience as possible for our work and have increasingly used Twitter alongside our website and newsletters to do this. We are encouraged by the levels of followers we have attracted, since this offers such a rapid means of sharing information and learning.⁴

This year we welcomed several new members of staff, including Sachin Sachdeva, our new India Director. Sachin was previously programme director at the Rajiv Gandhi Foundation, leading its work on community education, and before that was senior programme officer for health at the Sir Dorabji Tata Trust, the premier independent foundation in India. He worked for many years as the founding executive director of Aravali, which helps NGOs in Rajasthan with training and other capacity building. Aravali is currently funded by PHF. Sachin is leading on the development of our next strategic plan for India.

The coming year will see us marking the Foundation's 25th anniversary. As we look forward to celebrating this milestone the occasion also provides an opportunity to reflect on achievements to date and, as we develop our ongoing strategic plan, to ensure we continue to have meaningful impact into the future.

Robert Dufton
Director

⁴ Our Twitter feed can be found at www.twitter.com/phf_uk

As our own impact report reveals on page 48, it can be difficult for foundations to develop processes for effectively evaluating and learning from the grants they make. Here, David Carrington, a consultant to the philanthropic sector, shares his perspective on the development of approaches to learning and evaluation among charitable trusts and foundations as a whole, revealing a pattern of regular adjustment as foundations' practices have shifted and impacted on grantees.

Learning for foundations

It is usually unwise to attempt any generalisations about charitable trusts and foundations. They are quick to assert not only their independence but their individuality – the differences in the aims and aspirations of their founders, the differences in size, organisation and policies. Nonetheless, a number of developments over the last couple of decades have informed the practice, generally, of UK trusts and foundations. As part of a team of researchers, I have been working on the 'Shedding Light on our Own Practice' study, in which we interviewed 26 foundations from across Europe (including Paul Hamlyn Foundation) about their approaches to learning and evaluation. Our findings were launched at the European Foundation Centre annual conference in Belfast in June 2012, and a full report is due later in the year.

During the 1990s, trusts and foundations put a lot of effort into three main areas: clarity of communications, fairness in funding, and a sharper focus on supporting clearly defined projects with specific outputs. All these developments were intended to ensure that foundation funding was used in more deliberate and thoughtful ways than may have been the case previously. However, each also had some 'downsides', especially from the perspective of the organisations seeking funds.

For example, they could lead to inflexible, tortuous and time-consuming application and decision-making processes, making it more expensive, particularly for smaller organisations, to engage in transactions with foundations. Worse, applications themselves could lead to the organisation's work being distorted as it tried to shape and redefine what it thought needed to be done in order to meet the foundation's requirements and priorities.

Short-term, project-focused funding could easily lead to applicants asserting that they could achieve complex and ambitious targets within a limited timescale that in their hearts they knew was insufficient (and often with a level of funding that they knew would be inadequate). Output-focused work could lead to a disproportionate focus on narrow compliance and reporting – further increasing transaction costs for grantee organisations without necessarily adding any real value.

During the last decade, many foundations have sought to enhance further the ways they work so that these downsides are avoided. A greater focus has emerged on relationships with grantees that seek to strengthen the resilience of the funded organisations, look beyond quantifiable outputs to more subtle indicators of lasting outcomes, and generate mutually useful learning.

Foundations have also explored other ways they can add value to the work they support by introducing various forms of what has been described as 'funding plus', for example by creating opportunities for the organisations they support to share knowledge and experience (either in person or virtually), and by using the experience that has been achieved with the support of their funding to engage in advocacy and other attempts to influence the direction of public policy.

Some foundations have also extended the menu of the types of funding they provide to go 'beyond grants' and include (either directly or via intermediaries) loans, underwriting or other forms of investment and 'patient capital' – adopting various forms of what is called 'programme related investment'. This is intended, primarily, to help an

organisation achieve the social returns to which the foundation aspires, but could also lead to some or all of the funding being returned to the foundation once the work has been successful. A number of endowed foundations have also begun to explore how some of their endowment wealth could be channeled more deliberately into supporting the public benefit that their charitable purposes are focused on.

One common feature of these more recent developments is the emphasis on learning – on being clearer from the start of a funding programme or grant about what outcomes it is intended to achieve or to explore. Such action requires a foundation to make an investment – also from the start – in organisational capacity (within the foundation itself and within the organisations it is funding) to evaluate and learn from the work that is to be undertaken. Under this model, foundations:

- Apply the lessons learnt to the work as it evolves and develops
- Share the learning with peers and other organisations working within the same sector
- Use the learning that is generated actively to inform the policies and behaviour of others and to enhance the likelihood of the replication of successful pilot or experimental work

This greater focus on evaluation and learning has now begun to extend beyond the assessment of the work that a foundation is supporting to include a focus on the practice of the foundation itself – the ways its own behaviour and ways of working may influence (for better or worse) the realisation of the outcomes that it is hoped a programme or project will achieve. For many foundations, for many years, their practice has just been ‘the way we do it here’. Now this is changing, through reflection and review, consultation with others and studies of the perceptions of a foundation’s grantees and applicants.

As a consequence, foundations are making changes to their own practice and behaviour which they hope will, in turn, impact positively on the likelihood of their aspirations (and the plans of the organisations they support) being realised. For some, making such changes may seem a straightforward exercise but this is far from the case generally as many represent profound challenges to ‘the way we do it here’ and involve a foundation adopting not only different practice but a different ‘culture’ in the ways they work and communicate, internally and externally.

The experience of the foundations that have participated in the ‘Shedding Light on Our Own Practice’ study indicates a deepening curiosity and reflection about the ways a foundation works. This focus on foundations’ own practice can lead to substantial changes in attitudes to, expectations of and relationships with the organisations they choose to support – and to changes in the skills and focus of a foundation’s staffing capacity.

Examples of these changes include:

- Foundations increasingly seeking out and planning initiatives with organisations that they believe may be (or could become) best placed to deliver the outcomes to which the foundation aspires – relying less on ‘open’ applications and, even when maintaining open programmes, engaging initially with applicants in a much more flexible and discursive way.
- Foundations – not least at board level – spending much more of their time discussing the lessons being learnt from what the organisations they are supporting are doing, the strategic consequences for their own future direction and the ways they can add value or influence to the impact of the work that their resources have supported.
- Foundations and grantee organisations investing time and effort together in analysing and considering the learning consequences (for themselves and, potentially, for others) of the progress of a specific initiative – even (perhaps particularly) if it is not achieving its intended results.
- Foundations establishing much longer-term relationships with some of the organisations they support than would have been their practice previously – sometimes continuing to support and work with them (for example on policy advocacy or dissemination) well beyond the period of funding. In many cases, this continued engagement occurs in partnership with other organisations within communities of practice, interest or influence that the foundation and grantee have participated in (or built) during the period of funding.

It has also become clear that vital to securing such changes are the determination, enthusiasm and commitment of a foundation’s leadership, at both executive and board level. As one contributor to the ‘Shedding Light’ study commented, “in order for evaluation and learning to work, it has to be like breakfast, part of everyone’s DNA”.

The greater openness and transparency of practice adopted by these foundations has also encouraged grantees to be more ready than might have been the case previously to share with the funder the lessons being learnt from the work they are undertaking, as it happens – lessons about what is not going to plan as well as what is working. This can generate a more healthy, mutually valued and effective relationship.



David Carrington is an independent consultant working on the promotion of personal philanthropy and social investment, and on the funding and governance of charities and social enterprises. His clients have included many endowed, corporate and family foundations, private banks and wealth advisors, venture philanthropy funds, impact and social investors, in the UK and in continental Europe. He has been chief executive of three UK foundations including The Baring Foundation (1992–98). www.davidcarrington.net

Participants in English National Ballet's Dance for Parkinson's programme, which delivers dance workshops for people with Parkinson's disease. The impact of this work has been evaluated by researchers from Roehampton University who have quantified the physical and psychological benefits to those taking part.

Arts





Arts programme Report

In last year's report, we observed that it had been a year of change. In 2011/12, many developments have continued to unfold and have impact on the arts in the UK.

The public funding landscape has continued to shift, with fewer resources available to arts organisations and artists. While we welcomed some new or re-launched income streams – such as Arts Council England's new Strategic Funds or Creative Scotland's new funding categories – many local authorities have had to make drastic cuts to existing cultural provision. Across the country, 'good news' often meant that a long-established funding agreement was renewed for a year only. We saw two 'Henley reviews' published – first on music, then on cultural education – and though we support the recommendations they included, some of the commitments made by government or public services in their wake are not altogether clear or convincing enough.

The shape of the Cultural Olympiad did become much clearer as announcements were made and we indeed look forward to the flurry of projects that will culminate all across the UK this summer. We were also cheered to see a new independent charity, the Legacy List, set up to support the long-term cultural, social and physical regeneration of London's Olympic Park – providing a sense of longer-term planning.

Following the review of Arts Council England's portfolio of regularly funded organisations, many of our grantees have been working hard to agree key performance indicators to satisfy ACE's requirements. The Arts programme made significant grants to Dance United and Youth Dance England who had been, we believe, badly let down by not becoming National Portfolio Organisations last year. These organisations need to continue to play their part in ensuring a vibrant cultural life for those who most need it and we look forward to them finding ways to continue to thrive in the years to come.

New approaches to growth

Given the financial circumstances, we had expected to see more applications from organisations that were re-thinking their operating models or considering merging with others. Interestingly, whilst numbers of applications to our Open Grants scheme have remained stable compared with last year, we saw relatively few innovative ways of tackling issues of resilience – let alone of growth – in the current climate. Obviously, this thinking did happen, but we did not see enough applications reflecting it and we have been somewhat disappointed not to find out about more people's ideas on these issues.

A notable exception was the Lincolnshire One Venues approach to joining forces and sharing resources to empower young people to become more involved in the artistic programming and running of the ten venues involved. The LOV application showed a refreshing and bold approach to genuine partnership-working and we hope that our funding will enable them to unlock the potential they have identified. We very much hope that we will see more requests come our way that show this type of resourcefulness. We also continue to look forward to receiving applications for work taking place outside of London, particularly in Wales, Scotland and Northern Ireland – perhaps, for example, in the context of Derry being 'Capital of Culture' in 2013.

'Our Museum'

This year has seen the launch of our latest Special Initiative, Our Museum: Communities and Museums as Active Partners – the culmination of over three years of work with market research company LUCID, Dr Bernadette Lynch and, most recently, Dr Piotr Bienkowski.

With the support of a knowledgeable Steering Group chaired by Kate Brindley, the director of Middlesbrough Institute of Modern Art and an advisor to the Arts Programme Committee, we made nine grants to some of the organisations that had been part of the research that culminated last year in our report 'Whose cake is it anyway?'¹

¹ 'Whose cake is it anyway?' can be read online at the Foundation's website

The focus of this programme is organisational change and we are now starting to develop in earnest the peer-support mechanisms that are an integral part of this initiative, as well as the training framework that will go alongside our financial support.

We undertook reviews of two Special Initiatives this year: the Awards for Artists, which reached the fifth year of a five-year block of funding; and the Breakthrough Fund, under which three of the 15 grants made came to an end during 2011/12. A consultant, Kate Tyndall, led both processes.

On the Awards for Artists, we interviewed 26 previous recipients (about 30 per cent of all recipients since the Awards' inception) and analysed data since 2003 to look at the average age/earnings/location/gender of recipients. We also commissioned a mapping exercise of other awards and prizes available to visual artists and composers working in the UK.² On the Breakthrough Fund, an interim strategic assessment considered the positioning of the Fund within the UK arts funding ecology and assessed its ways of working, as well as the outcomes of each of the 15 grants.

Advocacy

In 2011/12, we continued to sit on the Steering Group of the Cultural Learning Alliance as one of the founding members and financial supporters of the group. CLA had a very busy year advocating a clear set of recommendations prior to both Henley reviews being published – as a powerful and respected collective voice working to ensure that all children and young people have meaningful access to culture in this difficult economic climate. We were particularly proud to support 'Imagine Nation: The Case for Cultural Learning', a vital document that includes key statistics, facts, quotes and evidence that demonstrate how – and why – the arts and heritage have the power to transform young people's lives. We very much look forward to our continued active association with CLA over the months to come.

Over the last year, we also established an informal group of arts grant-makers that meets regularly with senior members of the four Arts Council England regions – creating a forum where private and public funding bodies were able to discuss for the first time unfolding issues and strategies. This proved an invaluable 'safe space' which enabled meaningful exchanges with Andrea Stark, Moira Sinclair and their colleagues at ACE during a time of flux – for which we are grateful. We are very aware that ACE will need to embark quite soon on the reorganisation that is required by its reduced core funding and it feels appropriate that independent grant-makers should start to develop a better understanding of the challenges and opportunities that ACE is facing.

“Gaining support from the Paul Hamlyn Foundation has, on a practical level, awarded us the resources to create a culture of independent young arts audiences and producers over the next three years. But it has also given us renewed confidence in the ambition of LOV and the real benefits partnership working brings.”

**Chloe Brown, Project Manager,
Lincolnshire One Venues**

The year ahead

During 2012/13, the Arts Programme Committee and board of trustees will discuss the finding of the Breakthrough Fund's Interim Evaluation report, to decide whether to continue the scheme, and how. As the reorganisation of ACE unfolds, and in the light of new funding priorities for Creative Scotland, we will continue to monitor the UK's arts ecology.

² Results from the mapping exercise are now available as an online portal for funding sources for visual artists and composers working in the UK: www.fundingforartists.org.uk. The resource will be periodically updated but relies on information from users

Arts programme

Special Initiatives

Breakthrough Fund

Support for exceptional cultural entrepreneurs

£84,812 in 2011/12

The Breakthrough Fund aims to unlock significant developments and outcomes in the arts that would not otherwise be achieved. It responded to the compelling visions of outstanding individuals working across art forms and contexts in the role of 'cultural entrepreneur', offering transformational and timely support to them and their organisations to pursue these visions. There were three annual selection processes (2008, 09 and 10), which resulted in 15 grants totalling £3,879,765 – ranging from £83,000 to £360,000, with an average value of £255,000. During 2011/12, the first three of these grants completed (Felix Barrett and Colin Marsh/Punchdrunk Productions; Gareth Evans/Artevents; and David Jubb/Battersea Arts Centre). The remaining 12 will conclude at various points through to 2015.

As planned, Breakthrough Fund advisor Kate Tyndall undertook an interim evaluation of the programme to make an initial assessment of the outcomes and impacts of the Fund's grants, consider the strategic role of this kind of support, and analyse the way the Fund was set up and run. She drew on a thorough analysis of nomination, application and grantee data across three years; research to identify notable UK and international comparators; phone and face-to-face interviews to establish perspectives on the programme and its place within the current UK context; and the evaluation and monitoring of all the grants.

This interim evaluation will be considered by the Foundation during the coming months and updated as further grants conclude. It will also incorporate, in due course, longitudinal reviews two years after the completion of each grant. We expect to start disseminating some of the learning emerging from this work during 2012/13, and will be developing a view on whether to renew or re-imagine the Fund.

The Salon Project

An audience member is dressed to attend 'The Salon Project' at the Traverse Theatre, a music theatre event presented by Untitled Projects and Breakthrough Fund recipient Stewart Laing

Awards for Artists

Support for individual visual artists and composers

£416,462 in 2011/12

The Awards for Artists scheme supports individual artists to develop their creative ideas by providing funding with no strings attached over three years. The Awards are made on the basis of need, talent and achievement. In 2011, awards of £45,000, paid in three annual instalments, were made to eight recipients:

Composers

John Butcher, Larry Goves, Matt Rogers

Visual Artists

Janice Kerbel, Amalia Pica, John Smith, Sue Tompkins, Rose Wylie

During 2011/12, the Foundation undertook a review of the scheme to understand more about the impact it has had on the practice and lives of recipients; to update our knowledge of other prizes and awards in the UK; and to ensure that the scheme is still relevant and needed. The review resulted in trustees agreeing, in September 2011, to continue the scheme for a further five years and to increase each of the eight annual Awards to £50,000.

Findings from a mapping of other awards and prizes available to composers and artists in the UK are published on a new website (www.fundingforartists.org.uk), where users can search for sources of funding for individual artists and composers. We hope the resource will be useful to the wider sector.

The mapping exercise further confirmed the truly unique nature of the Awards for Artists in the UK.



ArtWorks: Developing Practice in Participatory Settings

Support for infrastructure development in artist training and development

£147,502 in 2011/12

Artists are at the forefront of delivering much of the work that the Foundation funds through its Open Grants. To be most effective, artists need training that will help develop not only their own practice, but also the skills required to work in participatory settings such as prisons or schools. Although training opportunities exist, they are far from comprehensive. Lack of coverage in certain art forms, geographical areas and settings is affecting the quality of work being delivered. ArtWorks therefore aims to achieve a significant shift in provision, infrastructure and opportunity that will directly affect quality.

We are supporting five consortia of artists, arts organisations, employers of artists and training providers to develop new approaches to training and continuous professional development in participatory arts. Each 'pathfinder partnership' is addressing specific issues to develop a better understanding of what constitutes quality in participatory work and what artists need in order to deliver this level of work.

In 2011/12, the partnerships carried out programmes of research and consultation, and began to deliver action-research based activities. Cross-pathfinder learning is a critical element of the work.

In October 2011, with support from the Cultural Leadership Programme, we held an event attended by 80 people – 'Leading through Practice' – that considered how artists lead in participatory settings. We commissioned research on further and higher education provision that will audit the initial training available to support this work. We also launched an online resource that is being populated as the initiative develops. We hope this will assist the wider sector in developing practices.

Project director Dr Susanne Burns is working closely with the pathfinder partnerships and an evaluation team, led by Tamsin Cox from DHA Communications, to develop a framework for dissemination of the learning that is emerging from the initiative.

Our Museum: Communities and Museums as Active Partners

Facilitating organisational change within museums and galleries

£1,435,747 in 2011/12

In July 2011, trustees allocated £3.2m to fund a new Special Initiative to support a process of development and organisational change within museums and galleries committed to active partnership with their communities, with the ambition of affecting the museum sector more widely.

Our Museum offers support for organisations to manage significant structural change. It is not about short-term project funding, but about facilitating organisational change so that participatory work becomes core, embedded, sustainable and less at risk of being marginalised when specific funding streams run out. In early 2012, grants were awarded to the following nine organisations: Belfast Exposed; Bristol Museums, Galleries and Archives; Glasgow Museums; Hackney Museum; Museum of East Anglian Life; Tyne and Wear Museums and Archives; National Museum of Wales; Ryedale Folk Museum; and The Lightbox, Woking.

This initiative is enabling these museums and galleries to place community needs, values, aspirations and active collaboration at the core of their work; to involve communities and individuals in core decision-making processes; and to ensure that museums and galleries play an effective role in developing community skills, through volunteering, training and apprenticeships. The distinctive characteristic of Our Museum is a collaborative and reflective learning process through which institutions and communities share their experiences and learn from each other as critical friends. Our wider aim is to document and analyse principles and ways of working that bring communities and their values to the core of museums and galleries – and that can be applied to other institutions to achieve significant shifts in participatory practice within the sector nationwide.

Dr Piotr Bienkowski was appointed project director in July 2011 and is leading the programme's development and implementation, working closely with an evaluation team of Gerri Moriarty, Sally Medlyn and Helen Corkery. They will run a session focused on the initiative at the Museums Association conference in Edinburgh in November 2012, titled 'How can organisational change make you a better participatory museum?'

Arts programme

Open Grants scheme



Sorrell Foundation

Young people engage in a masterclass with sculptor, Peter Randall-Page, at a National Art and Design Saturday Club held at Somerset College

The Arts Open Grants scheme supports work that increases people's enjoyment, experience and involvement in the arts. Our grants aim to enable organisations to experiment with and develop new ways of engaging with audiences and participants. This might mean introducing more people to traditional cultural activities or ensuring that the widest range of people have a greater opportunity to shape their own experience of the arts and culture.

Within this theme, we support work for people of all ages, with an emphasis on inter-generational initiatives where young people are one of the groups involved.

Grants awarded in 2011/12

Sorrell Foundation

£149,873 over 38 months

Saturday art clubs – where schoolchildren study art and design at their local further and higher education colleges – are nothing new. Established in the 1950s after the Festival of Britain had reignited a national drive to promote British art and innovation, the Saturday art clubs were, for a couple of decades at least, a hotbed for future creative entrepreneurs.

John and Frances Sorrell set up the Sorrell Foundation in 1999 after selling their hugely influential design consultancy. Both had cut their creative teeth at Saturday clubs before the idea was shelved in the 1970s, and they recognised the potential today's art colleges can offer to young people beyond their student body.

“There's a huge untapped resource available,” says Frances, “which can give young people an insight into the art and design sector and highlight the employment possibilities that, in most cases, their parents and teachers are unfamiliar with.”

The Sorrells revived the concept in 2009 and PHF was the first to endorse their commitment, facilitating an expansion in the number and geographical spread of participating colleges. By 2012, 17 colleges were committed, but with the announcement of government funding in response to the Henley Review of cultural education, and with other funders on board, the Sorrell Foundation is on target to have 50 colleges signed up – half of those available nationally – by 2014.



Sistema Scotland

Players from Big Noise Raploch, an orchestra programme targeting young people and their families in Stirling



Royal Shakespeare Company

Pupils from Longwick Junior School perform King Lear at the Swan Theatre, Stratford-upon-Avon, as part of the Regional Schools Celebration of the RSC's Learning and Performance Network

Under the programme, art colleges make links, often for the first time, with local schools. They invite pupils to enrol on a 30-week programme of Saturday events that, some participants are happy to admit, get them out of bed in the mornings. Guided by college staff and student volunteers, the pupils try their hands at drawing, painting, sculpture, photography, print-making, ceramics and digital graphics. A trip to London art galleries doubles up as a get-together for all participating clubs. Masterclasses from artists such as Anthony Gormley and Thomas Heatherwick confirm that fulfilling careers are achievable.

The young people stage an end-of-year show at Somerset House in London, where they proudly display their creativity.

“We celebrate their achievements and John and I make sure they all have their hands shaken and are given a certificate,” says Frances. “Some say it’s the first they’ve ever had.”

Ministry of Stories

£150,000 over three years

How do you get children interested in creative writing? Lure them into a ‘monster supplies’ shop of course, with tempting bars of ‘impacted earwax’ (clotted cream fudge) and tins of irresistible ‘zombie fresh mints’ (mint imperials). It is a strategy that is working well in Hoxton, East London, where unsuspecting children aged 8–18 are drawn into the clutches of volunteer writing mentors working at the back of the shop for the Ministry of Stories (MoS).

Inspired by the American author Dave Eggers, whose first writing workshop for children was fronted by a pirate shop in San Francisco, the MoS was set up by author Nick Hornby and co-directors Lucy Macnab and Ben Payne in 2010.

“We saw huge potential for the idea to translate into something we could do in the UK,” says Ben. “We chose Hoxton because not only is there a wealth of creative people – our potential volunteers – but there’s a high level of need with 75 per cent of local children from low income families.”

A six-month pilot was planned but, such was the response from local schools, young people and volunteers (1,000 came forward and 200 have now been trained), that the Ministry seamlessly continued with its stated aim of ‘creating a nation of storytellers’. Participants either attend on organised school trips, or through drop-ins and workshops like the after-school project to produce a series of children’s adventure tours of the local area.

From creating a local newspaper to composing soap scripts, the Ministry finds exciting ways to engage children in writing across all genres, conscious that the transition to secondary school can often be when a young writer’s interest dips.

“Writing a comic or for a computer game is as appropriate as writing fiction or poetry,” says Ben. “It’s important to give young people an insight into writing in all its forms.”

The PHF grant has supported the MoS to grow. Ben and his fellow ‘ministers’ are now investigating different sustainable models for replicating the idea elsewhere in the UK.

Acknowledging that a rich supply of creative volunteers underpins its success, he is confident that other projects, drawing inspiration from the Ministry, can take root across the country.

Meanwhile, at the back of the monster supplies shop, one inspired 10 year old writes: ‘There is a jelly stall at the Olympics and Sid the awesome panda is absolutely terrified...’

English National Ballet

£97,000 over 39 months

Inspired by the work of a dance programme for people with Parkinson’s Disease in Brooklyn, English National Ballet was determined that it too could make a difference for sufferers of this debilitating condition.

“I was convinced this was something we should be doing,” says Fleur Derbyshire-Fox, director of learning. “We had the resources to deliver the work with sensitivity and, as we have a national remit, we could – indeed, should – become UK ambassadors and make a real contribution.”

Since the launch of the first pilot sessions in 2010, English National Ballet has delivered regular sessions in London. Unlike other therapeutic interventions that use dance and music, its model is first and foremost an artistic intervention which has much wider benefits.

“It’s no good saying dance can help,” says Fleur. “You actually have to prove it.” And so, from day one, English National Ballet invited researchers from Roehampton University to analyse its programme. Through electronic monitoring, observation and interviews the academics were able to quantify the physical and psychological benefits.

One 70 year old participant commented: “Parkinson’s feels like having your feet nailed to the floor, but I feel good as soon as I come out of the class. I have a renewed feeling of confidence.”

“It’s a dance class, in a dance space, conducted by dance and music professionals,” says Fleur. “But with contributions from our costume designers, artists and musicians we also introduce the participants to the entire context of our work.”

Over a whole term, the participants work through different movements that stem from English National Ballet’s repertoire, building a dance vocabulary which they share in an informal performance and take away to their everyday lives. They also see the company perform, meet the dancers – some of whom they have worked with – and discuss the show afterwards over a cup of tea and a biscuit.

In much the same way the Brooklyn project has now rolled out across America, PHF funding has allowed English National Ballet to embark on a three-year expansion programme. Developing its delivery team and a strong network of four regional hubs, it will deliver short training courses and awareness days.

“We’ll be able to identify, train and support a dancer and musician in each area to lead pilots that replicate our London programme,” says Fleur. “And by working with regional Parkinson’s support groups we’ll expand this life-enhancing project to even more participants across the country.”

“Parkinson’s feels like having your feet nailed to the floor, but I feel good as soon as I come out of the class. I have a renewed feeling of confidence.”

Dance for Parkinson’s participant

Ongoing grant

Royal Shakespeare Company

£180,000 over 37 months

Six years ago the Royal Shakespeare Company (RSC) radically changed the way it worked with schools. Moving beyond the traditional workshop, it set up a new programme, still based on the excitement of working towards a performance, but adding a significant teacher training element that cascades to other educators in nearby schools.

The Learning and Performance Network was borne out of the RSC’s assertion that young people get the most out of the playwright’s work when they ‘do Shakespeare on their feet, see it live and start it earlier’.

“I think it is an amazing experience actually performing Shakespeare in front of hundreds of people and just to have the chance to do something like that is amazing. I would love to do it again!”

Samuel, a pupil from St Peter’s Primary School, Nottinghamshire

Each year another ten hub schools are enrolled into the network. In turn, each recruits seven partner schools in their regions. These clusters then embark on a three-year action research programme which starts with the hub teachers – normally English or drama specialists – developing their classroom practice through inset days with RSC actors and with trips to Stratford. Three teachers from each hub also begin a postgraduate certificate in the Teaching of Shakespeare, run by the RSC in collaboration with the University of Warwick.

After the first cohort of schools had gone through the programme, the University of Warwick Research Centre was also commissioned to analyse its effect. “It gave us robust, externally verified evidence of the impact on students, teachers and the wider school community,” says the RSC’s director of education, Jacqui O’Hanlon. “And, because it is as interested in the journey as in the destination, PHF also helped us share our research and have an honest, open dialogue with our peers.”

In its second year, the programme spreads its wings to embrace the cluster schools and work towards a regional performance in which hundreds of young people get stuck into a 400 year old play, bringing it to life for their communities. One student, after taking part in a performance, wrote: "I think it is an amazing experience actually performing Shakespeare in front of hundreds of people and just to have the chance to do something like that is amazing. I would love to do it again!"

Year three will see more performing and sharing within the cluster, bringing the Bard's work closer to a local audience.

"PHF has continually challenged us to deepen our connections with communities," says Jacqui. "This year we are working with five new regional theatre partners, and the hub schools, to explore how we can do this. Our legacy should be to leave a community that is much more confident in sharing Shakespeare with everyone."

A new grant of £320,000 over four years for the continuation of the Learning and Performance Network has been awarded and will start in the autumn of 2012.

Completed grant

Sistema Scotland

£234,000 over 28 months

"The Foundation was a crucial early partner for us," says Sistema Scotland's director and CEO, Nicola Killean. "They believed in our vision, gave us credibility and gave subsequent funders confidence in our ambition."

That was less than four years ago. This summer, as part of the London 2012 Festival, young musicians from a deprived Scottish housing estate shared an open-air stage in their home town with the world-famous Simón Bolívar Orchestra, as their families watched with pride.

The Simón Bolívar Orchestra is one of dozens established as part of the world-renowned 'El Sistema' scheme in Venezuela, where classical music is used as an instrument of social change. It has produced thousands of self-confident, engaged citizens and a significant number of internationally acclaimed performers.

Inspired by their results, Nicola and her team set up the first UK project in 2008 in Raploch, a troubled area of Stirling. Although the neglected physical environment was being regenerated, the potential of local children was overshadowed by the consequences of long-term unemployment and low self-esteem.

"Our Big Noise programme is about scale and intensity," says Nicola. "Learning an instrument is not easy and working en masse teaches young people about teamwork, cooperation and dedication."

Big Noise Raploch now works with 450 children, from toddlers to 11 year olds. The older children eagerly practice four nights a week after school and five mornings during the holidays. The social benefits to the children, their families, schools and community have been well documented in a government report. A father of two, delighted by his children's renewed focus, commented: "Confidence just oozes out of them both."

"Learning an instrument is not easy and working en masse teaches young people about teamwork, cooperation and dedication."

Nicola Killean, Sistema Scotland's director and CEO

Although Raploch is geographically well-defined with a small, settled population, Sistema Scotland is convinced an adapted approach can work in other pressurised communities. "Music as a tool can be transferred to larger urban settings," says Nicola. "We are investigating that now. Symphony orchestras should be in any community that needs one."

The benefits of preventative intervention with young people can be difficult to measure, but Stirling Council is more than convinced of the 'Big Noise effect' and has committed to fund 75 per cent of the Raploch programme from 2013. Some of today's young music-makers may become professional musicians, others may volunteer on the project or simply become dedicated parents listening to their own children perform. "It's about generational change," says Nicola, "and we are making that change right here in Raploch."

Arts programme

Grants awarded in 2011/12

Special Initiatives

ArtWorks: Developing Practice in Participatory Settings

Support costs	£147,502
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Awards for Artists

Eight awards to individual artists of £45,000 payable over three years.	
Composers: John Butcher, Larry Goves and Matt Rogers	£135,000
Visual arts: Janice Kerbel, Amalia Pica, John Smith, Sue Tompkins and Rose Wylie	£225,000
Review of Awards Scheme	£10,745
Support costs	£45,717
	£416,462

Breakthrough Fund

Oh Yeah Music Centre Additional salary support	£48,487
Support costs	£36,325
	£84,812

Jane Attenborough Dance in Education (JADE) Fellowship

Support costs: Ongoing evaluation	£3,051
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Our Museum

Belfast Exposed	£143,800
Bristol Museums, Galleries and Archives	£150,000
Glasgow Museums	£150,000
Hackney Museum Service	£150,000
Museum of East Anglian Life	£150,000
National Museum Wales	£148,600
The Crosland Foundation (Ryedale Folk Museum)	£150,000
The Lightbox	£149,625
Tyne and Wear Archives and Museums	£150,000
Support costs Consultancy, research and publication, along with a peer review	£93,722
	£1,435,747

Special Initiatives total

£2,087,574

Open Grants

Aldeburgh Music – UK wide To underpin a programme of residencies, performances and site-specific events, fusing electronic with classical music, alongside the 2012/13 Britten Centenary celebrations.	£105,000
Battersea Arts Centre – London Core support for a spectacular outdoor show based on the Babel story, developed across London by four of the World Stages London partners and the outdoor events producer WildWorks.	£145,000

Camden Arts Centre – London To support the further development of a long-term gallery programme of education work for artists, teachers and young people with profound and multiple learning difficulties.	£120,000
Carousel Project – South East Core support towards working with learning-disabled and marginalised artists to create a piece that comprises music, film and visual art elements, to be experienced live, online and as a touring installation.	£50,000
Dance UK – UK wide A business consultancy exercise by strategic development consultants Cause4 to build the organisation's capacity to explore possible new operating model(s) for their Healthier Dancer Programme, in the context of a larger strategic review by Kate Devey and Graham Devlin.	£10,000
Deafinitely Theatre – London Two-year funding to engage deaf children and young people aged 14–24 with theatre, through fully accessible workshops, performance opportunities and theatre productions – building on successful pilots to develop new strands of work.	£54,000
Earlyarts (UK) Ltd – UK wide Funding for the director and a new post of business development manager. This support will enable Earlyarts to develop a new operating model and a strategic partnership with Arts Council England.	£150,000
English National Ballet – UK wide Three-year programme to provide dance and cultural activities for people with Parkinson's. The organisation will research the benefits, devise a training programme, and set up satellite projects.	£97,000
Fevered Sleep – UK wide Two years of funding to continue to test a new touring model for performance for children under seven.	£115,000
Firstsite – East of England Support for a programme which aims to increase the understanding and enjoyment of contemporary art, building social capital through participation and social activity.	£140,000
Homeless Link – Multi-regional Support to increase homeless people's access to arts activities by increasing homelessness agencies' capacity to deliver and build partnerships with arts organisations.	£64,000
Kielder Partnership Initiative – North East Support for a pilot to bring together public, students and practitioners in a programme of experimental architectural education and activity at Kielder Water & Forest Park.	£40,000
Leisure in the Community – East Midlands This consortium of ten organisations across Lincolnshire will collaborate to change the dynamics of artistic programming and deepen young people's engagement, allowing them more contact with creative practitioners so that they can be involved as consumers, critics, aspiring artists and creative entrepreneurs. Our grant will support four key salaries for new posts.	£189,500
Manchester Library Theatre Development Trust – North West A grant towards a project using drama and creative storytelling to engage older people with Alzheimer's and dementia in beneficial creative activity.	£75,000
Middlesbrough Institute of Modern Art (MIMA) – North East To pilot an apprenticeship scheme, putting three young people at the heart of operations, training and programming, developing the skills to act as mentors for other young people.	£52,000
Ministry of Stories – London Supporting core costs in order to develop and expand a programme of creative writing workshops for schools and drop-in sessions for children aged 8–18.	£150,000

More Music in Morecambe – North West Our support will enable pilot community engagement and programming for new multi-purpose spaces.	£30,000	Site Gallery – Yorkshire and Humber To support the development of an artist-led participation programme and pilot a mentoring scheme as well as a summer school.	£16,000
muio.org Ltd – North West Core support to develop and test gizzine, an Android phone application that enables audience interaction to influence creative programming in real time. Our grant will help create a body of work to demonstrate possible uses, sort out specific technical issues and identify routes for monetisation.	£9,150	Tate Gallery – UK wide Core funding of an organisational development phase to transform radically the way Tate engages its audiences with art.	£100,000
Museum of London – London Support for family learning at the Museum of London.	£15,000	The British Library – Multi-regional To help open the Library's collections to interpretation/curation by young people (including those who are not in education, employment or training) via supported activities, developing skills, enhancing confidence and team-working.	£138,000
National Museums Liverpool – UK wide Our support goes towards the second conference in Liverpool in October 2011 of the Federation of International Human Rights Museums, led by National Museums Liverpool's International Slavery Museum.	£10,000	The Museum of British Folklore CIC – UK wide This funding will support this young organisation, dedicated to promoting, celebrating and revitalising the folk heritage of Britain, to develop a learning and participation programme for its exhibitions – the first of which, 'The History of Fireworks in Britain', was produced at Compton Verney.	£9,600
National Society for Education in Art & Design – UK wide Funding to support a transition phase to enable NSEAD to take over the management of this continuous professional development scheme for teachers and trainee teachers, following on from the support we gave in 2009 to The Making to develop this programme.	£40,500	The Nerve Centre – Northern Ireland Funding to support programming costs for the Nerve Centre's Academy of Music for 2013.	£150,000
National Theatre – London A grant towards the creation of a Young Studio, offering young people opportunities to create and develop their own work.	£147,000	The Poetry Archive – UK wide Building on PHF-funded research, this grant will enable digital downloads to be available for purchase on the Poetry Archive website. This will enable the public to buy individual or collections of poetry recordings, in most cases of a poet reading his/her own work.	£29,500
National Theatre Wales – Wales Continuation grant to develop a Wales-wide, internationally recognised community network which engages with all levels of NTW's activities, rooted in a model of local community leadership.	£220,000	The Poetry Archive – UK wide To enable Poetry Archive to assess the potential income for digital poetry downloads.	£10,000
OTO Projects – UK wide To underpin the creation of a new key post – a producer – as well as feasibility study work.	£45,000	The Samling Foundation – North East Funding for a scoping exercise to develop the 'School as Producer: The Magic Flute' project.	£10,000
Pacitti Company – Multi-regional To carry out action-research with a wide range of artists and participants with a view to finding new working models.	£8,500	Theatre Centre Ltd – UK wide Development of a National Playwriting Network and skills provision for playwrights, promoting the artistic potential of work for young audiences in the wider writing community.	£53,800
Philharmonia Ltd – UK wide Core support towards the development, installation and touring of an immersive, interactive audiovisual installation representing a virtual Philharmonia Orchestra performing Holst's The Planets, enabling the public to explore the orchestra from inside, first at the Science Museum, London and then across the UK.	£100,000	Voices Now – UK wide To support the 2013 festival, bringing together leading vocal groups and singers of all backgrounds and abilities, and inspiring potential singers to get involved.	£35,000
PRS Foundation – UK wide A continuation grant to support a further cohort of independent producers and arts organisations, encouraging innovative approaches to music programming and audience engagement throughout the UK.	£90,000	Voluntary Arts Network – UK wide To support short-term artist workshops, working with intergenerational groups of makers, and training sessions in online marketing and social networking opportunities.	£58,000
Random Dance Company Ltd – London Creative Potential will test whether the Choreographic Thinking Tools used within Wayne McGregor's artistic practice can be disseminated through the company's Creative Learning work.	£73,000	Wysing Arts Centre – East of England A programme that seeks local individuals and groups and celebrates their interests by positioning them alongside artists within Wysing's curated programme.	£90,000
Ravensbourne – Multi-regional To support the development of an informal, sociable and collaborative learning environment for young people aged 16–19, using pattern-matching artificial intelligence to create responsive web pages to encourage a conversational learning environment through an animated figure (the 'Ravensbot').	£134,000	York Citizens' Theatre Trust Ltd – Yorkshire and Humber Core support of the TakeOver Festival in its third and fourth years, introducing a residency scheme for young theatre practitioners that will result in a bespoke production each year.	£100,000
Royal Shakespeare Company – Multi-regional A continuation grant towards the re-imagined Learning and Performance Network to develop new partnerships between state schools, regional theatres and the RSC and build on the achievements of the programme to date. This professional development scheme is aimed at teachers, RSC company members and staff in regional theatres.	£320,000	Youth Dance England – Multi-regional To help YDE continue to deliver strategic interventions, a revised national programme and review of its Ten Year Vision for Children and Young People's Dance 2010–2020 manifesto.	£170,000
Scottish Poetry Library – Scotland Grant towards a pilot programme of storytelling, poetry and songs across care homes for the elderly in Scotland.	£104,900		
		Open Grants total	£3,873,450
		Arts programme total	£5,961,024

Pupils at Sheffield Star Mandarin School, a supplementary school that enables young Chinese students to earn qualifications in their mother tongue alongside the English-based curriculum in their mainstream school. Languages Sheffield, supported by the Foundation, works with a range of national community groups in Sheffield to provide better opportunities to achieve for children for whom English is a second language.

Education and Learning





Education and Learning programme

Report

The strategic aim underpinning the work of the Education and Learning programme since 2006 has been ‘to support innovative ways of increasing people’s education and learning’. In particular we have aimed to ‘support the development and dissemination and diffusion of new ideas that work in improving education and increasing the learning of people of all ages’. This past year has seen much of the work of our own Special Initiatives, and that of a number of grantees, progress from earlier development phases, to actively sharing learning and practice with the wider sector.

Due to shifts in government policy and public sector cost-cutting measures, the sector has lost a number of key networks and agencies that previously helped to foster the sharing of best practice, particularly for schools. We remain committed to ensuring that the new thinking and practices that we are helping to develop are accessible to as many people as possible.

Teaching and learning

Much of our learning this year has related to teaching and learning practice. Although we are clear that there continues to be a place for conventional, typically transmissive models of teaching in 21st century educational institutions, and that developing basic skills and core knowledge sets will remain important, these alone are not likely to be sufficient. In the words of our trustee Estelle Morris, we believe that “any 21st century education that stakes a claim to be relevant, engaging and leading to good-quality progression would surely look different to the one that served us so well some 30 years ago”.

With our focus on encouraging innovation, we are interested in understanding what sorts of differences are likely to be most effective in helping children and young people to engage with their learning, achieve better learning outcomes and become successful life-long learners and contributors to society. All of our Special Initiatives, and many of the organisations supported through our Open Grants, have contributed to this important area for educational enquiry.

Musical Futures has continued to address this specifically within the school-based music curriculum, while Learning Futures has tested cross-curricular approaches. Our What Works? Student Retention and Success programme has focused on practice in higher education. All three initiatives have published new resources this year that offer practical guidance to teachers and school and university leaders, together with key underpinning principles that help to illuminate the values and thinking behind the practices being advocated.

Under Learning Futures we have produced this year a series of publications that share several key approaches for enhancing student engagement and enabling schools themselves to become more engaged and engaging. These findings also have significant implications for wider issues of school organisation, structure and culture.¹

Research conducted under the What Works? initiative has consistently found that a strong sense of belonging lies at the heart of successful retention and success in higher education, and points to the academic domain as the area in which this should, as a priority, be nurtured. We shared our findings, and recommendations for how to ensure belonging, with over 250 university staff and leaders at a two-day conference in March 2012.

Our Learning Away and Musical Bridges Special Initiatives have also had a strong focus on teaching and learning practices, the former in the context of residential learning experiences, and the latter as a key element in strategies to improve students’ experience of their transition from primary to secondary school. Both of these initiatives will, over the next year, begin more active dissemination of their learning and sharing of the best practice examples that we have seen developing in our partner schools.

Open Grants themes

Through our Open Grants scheme, we awarded 44 grants, totalling £3,936,936, in 2011/12. These fall under three themes: Preventing and reducing the impact of school truancy and exclusion; Developing speaking and listening skills for 11–19 year olds; and Supplementary Education. We have introduced new funding

¹ More details of these publications are on p. 25

priorities under two of these themes to encourage applications focused on some key areas where we hope our grants can achieve a significant and strategic impact.

Under the Truancy and Exclusion theme we are now inviting applications with a focus on supporting young people through periods of transition, particularly from primary to secondary school and when they leave school or formal education. Under the Supplementary Education theme we are also encouraging proposals to support the post-16 progression of supplementary school pupils from black and minority ethnic backgrounds. Secondly, we are keen to encourage the development of strong, sustainable partnerships between supplementary and mainstream schools, for the benefit of underachieving pupils.

It is particularly challenging to achieve high levels of commitment from both mainstream and supplementary school partners. We have been pleased to support several grantees that are leading the way in building and demonstrating the impact of such partnerships. Several of these grantees, including Shpresa, Amana, Enfield Voluntary Action, the Northamptonshire Association of Supplementary Schools and Languages Sheffield², attended a workshop at our offices to share effective approaches and discuss common challenges. Over the coming year all of our grantees will be invited to attend similar collaborative learning events to share their experiences and learning.

We will also be finalising a directory to showcase the programmes we have supported under our Speaking and Listening theme. This will outline the opportunities and resources that grantees can offer to help young people develop the communication skills to enable them to contribute successfully in the workplace and their community as they progress into adulthood. We have seen a good number of our Speaking and Listening grantees this year reach stages in the development of their work where they are actively scaling up their programmes or disseminating resources to help others replicate or learn from their work.

I CAN, for example, has expanded its Secondary Talk programme from an initial pilot in 14 schools to 35 schools across the country, where it is helping to ensure that staff across the schools are confident in developing students' communication skills.³ Through its Youth Amplified project, the Speakers' Corner Trust, working with Leeds University, has developed a set of resources for young people and teachers/youth workers, focusing on how to develop skills of expression, building common cause and influencing others. Peace Child International, the English and Media Centre and the Geographical Association are other grantees committed to sharing the learning and resources from their speaking and listening work with others.

“The Youth Amplified website and resources have been widely taken up – from schools across the country to BBC BiteSize. Thanks to this valuable funding, we have been able to help teachers to help develop the kind of speaking skills that our democracy badly needs.”

Stephen Coleman, Professor of Political Communication, University of Leeds

The year to come

We hope that our commitment to developing new approaches to securing learner engagement and progression will continue to make a significant contribution as these approaches spread around the country. Through the work of our grantees and Special Initiatives, we hope to ensure that many more young people are confident and equipped with the skills they will need to help them succeed as 21st century workers and citizens.

² Languages Sheffield features as an Open Grants case study on p. 28

³ See also the National Literacy Trust case study on p. 29, a further example of a programme that has expanded from a localised pilot through a wider roll-out

Education and Learning programme

Special Initiatives

What Works? Student Retention and Success programme

Learning how best to ensure student success in higher education

£22,546 in 2011/12

Significant resources have been invested over the past decade in attracting young people from under-represented groups into higher education. The goal of the What Works? initiative is to help build understanding about how best to support students once they arrive at university. The initiative's purpose is to ensure that as many young people as possible succeed in what is often a daunting new environment and learning context. The initiative has been jointly funded with the Higher Education Funding Council for England (HEFCE).

Twenty two higher education institutions, working in seven groups, have participated in the initiative by evaluating a range of interventions – such as personal tutoring, the use of student advisors, peer mentoring and induction activities – and researching the most effective practices to ensure high student continuation and completion rates. The three-year studies typically combined student survey data, qualitative research with students and staff, and analysis of institutional data. The studies were completed this year, at a time when profound changes in the higher education sector will make even more significant the strategies that universities employ to ensure all their students experience success.

Despite the diversity of evaluative methods and foci, findings and conclusions were remarkably consistent. All found that at the heart of successful retention and success is a strong sense of belonging for all students. Although some specific interventions were shown to improve retention rates by up to 10 per cent, it became clear that the key to boosting student retention and success lies not in any specific type of intervention but in ensuring that retention strategies are intentionally designed to foster student belonging and exhibit a core set of characteristics to help achieve this.

On average in the UK, only one in 12 students actually leaves higher education during their first year of study, but What Works? student survey data across several institutions found that between one third and two fifths of students think about withdrawing. This is a significant minority and suggests that student entry characteristics, for example, may no longer be sufficient indicators of likely withdrawal.

This finding, together with increasing numbers of part-time, mature and home-based students, has led us to our key recommendation: that proactive work to improve student belonging and engagement should be a priority for all university programmes, departments and institutions, and that belonging should be nurtured, as a priority, through the academic sphere.

Our What Works? report, 'Building student engagement and belonging in Higher Education at a time of change', sets out a series of recommendations for HEIs wishing to improve their practice in line with our findings, including a set of characteristics of effective interventions and approaches, and a set of strategic or institutional-level recommendations. In addition, a 'Compendium of Effective Practice: proven ways of improving student retention and success' has been published to provide more practical examples of successful interventions, drawn from the HEIs that have participated in What Works? and the wider sector.

“The benefits that a university education typically adds to an individual’s career prospects and to their quality of life generally is widely recognised, but is something that needs greater articulation. The outcomes of the seven [What Works?] projects... will help to convey this message and provide an excellent foundation to continue both the sharing and development of good practice across the sector.”

Professor Eric Thomas, President of Universities UK

Over the next four years, we will be supporting a second phase of this initiative, to be led by the Higher Education Academy and aligned with its series of institutional-level change programmes. HEA will work with a number of universities to test our recommendations from the first phase, with a focus on teaching and learning approaches and interventions integrated with academic programme delivery. A key priority will be to build a strong evidence base of impact, with a standard evaluation framework and methodology applied across the project.

Learning Futures

Developing teaching and learning to achieve breakthroughs in learner engagement

£393,283 in 2011/12

Learning Futures has now reached the end of the development and piloting phase that we have funded since late 2007. Our primary objective has been to develop and trial innovative methods of teaching and learning aimed at increasing students' engagement with their learning. In this we have joined a growing international movement of researchers and educators who have been looking beyond indicators of compliance as measures of engagement to a deeper sense of engagement, characterised by commitment, responsibility and a desire to prolong learning beyond the school gates and timetable.

Although we have only had two academic years of actively trialling approaches in our partner schools, their commitment and the combined expertise of our programme partners and staff mean that we are able to conclude our funding of this initiative, confident in the depth of understanding achieved. We have published a clear set of practical pedagogical and wider organisational recommendations to enable other schools to learn from and implement the Learning Futures approaches.

These approaches – Project-based Learning, Extended Learning Relationships, School as Base Camp and School as Learning Commons – are described in a set of pamphlets, 'Learning Futures: A Vision for Engaging School', 'Work That Matters: The teacher's guide to project-based learning' and 'The Engaging School: A handbook for school leaders'. This latter resource sets out some key implications and resulting recommendations, relating to wider issues of school organisation, structure and culture, to maximise engagement. This approach, we would argue, needs to balance the traditional dominance of curriculum subjects as the main basis for organising the school. The recommendations also warn of the invisibility of professional practice in some schools, which greatly limits opportunities for teachers to learn in a sustained way from each other's teaching or collaborative reflection.

The schools with which we have worked are committed to extending and further embedding Learning Futures approaches, and we are pleased that the Innovation Unit will be proactively taking the initiative further and offering support to schools across the country that wish to learn from our work, to become more engaging schools. Further information on these opportunities and all resources are available at www.learningfutures.org

Learning Away

Achieving more through school residentials

£127,968 in 2011/12

Through this initiative, we aim to encourage schools to make a greater commitment to providing high-quality residential learning experiences for their pupils.

During 2011/12 we began to gather good evidence that residentials can have a strong, positive impact on academic achievement and a wide range of other pupil outcomes, including wellbeing, learner engagement, personal, social, employability and life skills. Working with 60 partner schools, both primary and secondary, we will be building on this to further demonstrate that these experiences can transform the learning experience of pupils and can also help to transform schools, with lasting impact. This is most likely to be the case when residentials are closely integrated with the wider school curriculum, when they are designed and delivered by school staff and pupils themselves, and when they exemplify the formula proposed by Minnett *et al.* (2008) that 'powerful pedagogy + trusting relationships = student engagement'.

Learning Away teachers typically use highly pupil-centred strategies, with a strong emphasis on actively involving pupils in planning and making decisions related to their residentials to ensure relevant and personally meaningful learning opportunities. Secondly, the widespread use of practical, active, experiential learning approaches, often involving group collaboration and problem solving, is clearly proving significant in ensuring pupil enjoyment, motivation and engagement.

Many of our partner schools are also showing that high-impact residential learning does not need to be expensive or far from home. Several are investing in camping equipment and running residentials under canvas – some in remote locations, others in local parks or woodlands, and some in the grounds of their own or partner schools.

Over the coming year, the focus of our work will broaden from supporting the development of practice across our 60 schools, to a more outward-looking phase during which we will more actively share our findings and learning with the wider sector and seek to influence more schools to increase their commitment to residential learning.

Musical Futures

Transforming music education in schools

£147,997 in 2011/12

Musical Futures has now been running in secondary schools for seven years, with more than 500,000 students having benefited to date. The initiative is grounded in our belief that music learning works best when young people are making music themselves and when their existing passion for music is reflected and built upon in the classroom.

Our 31 Champion Schools have continued to exemplify the Musical Futures approach and ethos and between them ran 45 continuing professional development courses for music teachers, attended by more than 300 practising teachers and 240 teacher trainees during the 2010/11 academic year. We estimate that more than 150 schools in England are introducing Musical Futures to their music departments each year and that well over 1,000 secondary schools are now using Musical Futures to help deliver their music curriculum.

During the year we launched pilot programmes in Scotland, Wales and Northern Ireland, working closely with a number of schools in each country to develop their Musical Futures practice and pave the way for the wider take-up anticipated during the next academic year.

We welcomed a report from Ofsted, 'Music in Schools: Wider still, and wider', which conveyed a deep understanding about what excellence in music teaching and learning should look like. One of our Musical Futures Champion Schools, Flegg High School in Norfolk, was chosen as the subject of one of six best-practice case study films that accompanied the report. The report also highlighted that too much music learning in school is inadequate or barely satisfactory. Musical Futures practice in schools also inevitably varies in its quality, and in its fidelity to our core principles. We will be working over the next year to try to improve consistency of delivery given the resources and structures that we have to support the programme.

Musical Bridges: Transforming Transition

Improving practice to support young people as they progress from primary to secondary music education

£178,049 in 2011/12

Musical Bridges aims to address, in relation to music education, the problems children often experience as they transfer from primary to secondary school, such as a lack of continuity of learning and progression.

This year we have completed an initial piloting phase of a continuous professional development (CPD) programme that brings primary and secondary teachers together to better understand effective practice and plan how to support transition. In the coming year we will be piloting this further via ten music services and working to finalise a CPD package to be made available to schools through the new music education hubs due to launch across England in August 2012.

During the year we published our 'Changing Key' report, setting out findings from a longitudinal investigation into pupils' experiences of primary to secondary school transition in music. Despite high musical aspirations being expressed by most new Year 7 students involved in the study, many began defining themselves as non-musical during their first year at secondary school. Their often narrow views of what it means to be 'musical' highlight the importance of inclusive music education, in which schools value the widest range of students' musical engagement, both in and outside school. Our findings also suggest that many pupils would have benefited from more complex music teaching at primary school and from a better match between supply and demand in instrumental lessons at secondary school.

We have launched a website (www.musicalbridges.org.uk) to host resources and best practice examples. We will also be developing a musical biography resource for pupils to facilitate the sharing of information between primary and secondary school teachers. We hope to share our experience of this process to support efforts to take forward the recommendation, within this year's Review of Cultural Education by Darren Henley, for a national cultural education passport for students.

Education and Learning programme

Open Grants scheme



Development Education Centre (South Yorkshire)
Pupils at Totley Primary School participate in a Philosophy for Children class, part of the Building Communities Through Dialogue project



Bedlingtonshire Community High School
Young people take part in group activities to improve self-esteem and attendance at school as part of the Youth Transition Team, working with middle schools in Northumberland



Talk Together London CIC
Students take part in a cross-cultural supplementary school to boost the attainment and confidence of bilingual young people

The Education and Learning Open Grants scheme operates across three themes.

The Speaking and Listening theme supports activities, taking place in or outside of school, which develop the oral communication skills that all young people need to become effective, contributing members of society.

The Supplementary Education theme supports the work of supplementary schools (defined as schools which operate on a part-time basis, led by voluntary sector organisations and with the active support of parents and the local community) primarily for the benefit of children and young people from black and minority ethnic communities.

The Preventing Truancy and Exclusion theme aims to support preventative work that will reduce the chances of children and young people reaching the point of persistent absence or exclusion from school, by enabling those considered to be most at risk of this to achieve and progress alongside their peers.

Grants awarded in 2011/12

Somali Community Parents Association
Supplementary Education theme
£129,670 over two years

In front of a packed hall, with microphone in hand, a Somali teenager feeds back on why his team thinks communication is important: "It is most vital when looking for a job and it helps you understand different people from different backgrounds," he says, reading from a long list.

This is one of the first sessions of a PHF-funded speaking and listening skills course run by the Somali Community Parents Association (SOCOPA), a support project in Leicester that motivates and champions the local Somali community with a range of advice, training, English classes and addiction mentoring.

Its founder and executive manager, Abdikayf Farah, says: "Since we began in 2005 we have always worked with our local schools, helping families engage and integrate as well as educating the school about our culture."

Despite best efforts, attainment at school-leaving age, particularly among boys, is low. "Just filling out an application or making a call to a prospective employer is challenging for many young people," says Abdikayf.

The course is a pilot – run during the three half-term holidays – to support 11–19 year olds with their speaking and listening core skills by engaging them in community projects and debating issues relevant to the Somali population.

Crammed into the first week were visits to older people's homes, hands-on painting and decorating and video-making. "In each situation they were interacting with other people," explains Abdikayf. "At the end of the week there was another presentation – attended by parents – where the whole group reported on its achievements."

The subsequent weeks of the course saw the young people explore issues of democracy and cultural awareness, examining stereotypes and challenging perceptions of themselves within the wider community. The grant allowed SOCOPA to enlist partners to deliver what is an intensive programme including a session with the UK Parliamentary Outreach Service, a Q&A session with the local MP, and support from a number of other charities.

"The feedback has been amazing. The whole community has got behind the project. The young people really enjoyed it and their confidence shot up," says Abdikayf.

"It's not easy working with a community that has experienced the trauma of civil war for such a long time. There is little trust between each other but with our philosophy of openness and transparency we hope to rebuild that trust. It's challenging but when you see the results of projects like this it's also very rewarding."

Languages Sheffield Supplementary Education theme

£135,000 over three years

In Sheffield, educational achievement for black and minority ethnic (BME) children is well below the national BME average. The Foundation funded a project that enables bilingual children to gain accreditation when learning their mother tongue, providing opportunities for having their achievements recognised for the first time.

"Less than a quarter of our bilingual children sit a formal examination in their home language," says Caroline Norman at Languages Sheffield, part of a consortium that has set up the Home Language Accreditation Project (HoLA). "Gaining a GCSE in their own language has a knock-on effect on achievement across all subjects and can significantly improve a mainstream school's exam results."

A 12-month pilot, completed in September 2011, followed over 150 pupils from five community language schools – Chinese, Korean, Russian, Arabic and Mandarin – and

matched up their learning experiences with the education database that documents their mainstream achievements. Certificates were sent to their mainstream schools, some of whom had no idea of the extra-curricular learning.

"One primary school was astounded that three of their less academic pupils had clocked up over 100 hours of Arabic through regular attendance at a Saturday school," says Caroline. "It changes perceptions amongst teachers and raises self-esteem when the certificates are presented during school assemblies."

Although taught to GCSE standard, few community language schools have the resources to enter their students into examinations. HoLA is now supporting mainstream schools to enter these candidates as part of their regular exam season, although the subject has not been part of their own curriculum. "We can organise a trained, native-speaking examiner for the speaking part of the test, and coordinate students coming together at one venue to sit the examination," says Caroline.

PHF's support is paying for a project manager and support workers to organise what should become a sustainable initiative. Part of the project is to train the community language school tutors so they can be more employable by the mainstream schools as classroom assistants or learning mentors, further strengthening connections between the sectors.

"While we have the resources we intend to influence national policy," says Caroline. "There should be more qualifications in community languages – a Somali GCSE, for example, would benefit that community hugely – and a national roll-out of our initiative is completely achievable."

Development Education Centre (South Yorkshire) Preventing Truancy and Exclusion theme

£107,948 over three years

Development Education Centre (South Yorkshire) works with schools to raise awareness of how global issues affect everyday life. It developed a pilot project that used the latest learning techniques to foster greater understanding between Year 6 pupils from different backgrounds.

"Some of the secondary schools in Sheffield take children from both the mono-cultural leafy suburbs and from ethnically diverse inner-city schools," explains Clive Belgeonne, leader of the Building Communities Through Dialogue project. "By the time they first meet in Year 7 they might have already formed damaging assumptions about each other."

To counter this, the project engages ‘pyramids’ of one secondary school and four corresponding feeder primary schools. Pupils from contrasting primaries are matched to become pen pals, before attending sessions – at ‘neutral’ venues – where participants are encouraged to discuss an issue, ask questions and invite debate. Using methodologies such as Philosophy for Children (P4C), Clive says, “pupils are invited to dig deeper around the issue and begin to recognise – and respect – conflicting perspectives.” Older pupils from the secondary school are also involved, supporting them during their P4C activities.

PHF’s support for this programme stems from the observed impact of the pilot on teamwork skills and confidence. Disruptive behaviours that can be indicators of future exclusion were seen to reduce in participating pupils. Transition from primary to secondary school is a key time in a child’s development, and the aim of this project to ease the process was attractive to the PHF Education and Learning team. The funding extends the pilot to a range of primary and secondary school groupings in Sheffield. The project will now evaluate closely pupils’ perceptions of their school environment and willingness to mix with those of different ethnic backgrounds, and the impact this has had on truancy and exclusion at secondary level.

The grant provides for extensive research and analysis by experts in the social and emotional aspects of learning. “By engaging in this open-ended dialogic learning we hope pupils’ self-confidence will improve as they realise they have something to contribute,” says Clive. “It isn’t always about a right answer: a diversity of views is beneficial for learning. We already have evidence that P4C techniques have a positive impact on behaviour and attendance.”

Clive expects that, once established, participating schools will continue with the mutually beneficial collaboration: “Most schools recognise that anything that can help pupils feel more confident and integrated during transition is a good thing.”

Completed grant

National Literacy Trust

Speaking and Listening theme

£124,751 over two years followed by a new grant of

£200,000 over 27 months

Launched as a two-year pilot, Words for Work is a National Literacy Trust (NLT) programme aimed at improving young people’s communication and employability skills. Local business volunteers and secondary school pupils come together through creative workshops to explore speaking and listening in the workplace.

“For years employers have bemoaned young people’s inability to present themselves effectively, work in a team or engage with the public,” says project manager Sally Melvin. “With ‘top down’ pressures on schools to stick to a rigid curriculum and focus exclusively on exam results, the teaching of essential life skills is too often neglected.”

After testing and developing the scheme with two enthusiastic secondary schools in its first year, NLT expanded its pilot to another 13 secondary schools in year two, eventually engaging 450 pupils and 180 business volunteers.

“I’ve learned about body language and how to discuss different issues; how to communicate with people I don’t know,” says Norman, a 14 year old from a Birmingham academy. “School is not going to help me get a job, but Words for Work can help.”

Feeding back on the project, participating teachers related how pupils’ attainment levels increased and, significantly for the Trust, other staff acknowledged the positive effect of this ‘off-curriculum’ intervention. “The confidence levels of students trebled throughout the project,” said a teacher at a Lancashire school. “The change was unbelievable.”

However, not all schools fully engaged with the project, and a thorough evaluation allowed the Trust to amend its approach.

“We learnt two things: we needed a local contact to drive the project forward and, as a small team, we didn’t have the capacity for a national roll-out,” says Sally. “So we went back to PHF who listened to our new plans to grow the project.”

A second grant is now supporting the Trust to engage local organisations who have an existing relationship with schools and businesses to act as regional hubs. “We are effectively franchising the programme, actively recruiting partners like education business partnerships and football community trusts, to manage and deliver Words for Work,” says Sally.

Although recognising quality assurance and effective evaluation may become future challenges, the Trust hopes to have set up 20 hubs within two years, each supporting five secondary schools – potentially reaching thousands of children.

Prompted by its success with Words for Work, NLT hopes a forthcoming curriculum review will support a change of culture where teachers are trained in the value of speaking and listening skills.

Education and Learning programme

Grants awarded in 2011/12

Special Initiatives

Learning Away

Support costs	
Development and evaluation, events and school support costs	£127,968

Learning Futures

Language Futures development:	
Castle Manor Business & Enterprise College	£5,500
Linton Village College	£12,000
Swavesey Village College	£3,500
Support costs	
Research, dissemination, website development and consultancy	£393,282
	£414,282

Musical Bridges: Transforming Transition

Support costs	
Research and evaluation, advocacy and dissemination, events and consultancy costs	£178,049

Musical Futures

Support costs	
Development, advocacy, dissemination, teacher CPD and school support costs	£147,997

Musical Futures UK

Support costs	
Dissemination of Musical Futures to Scotland, Wales and Northern Ireland	£106,869

What Works? Student Retention and Success programme

Support costs	
Coordination, dissemination and evaluation costs	£22,546

Special Initiatives total **£997,711**

Open Grants

21st Century Learning Alliance – UK wide Support for teaching fellowships for 2011/12.	£10,000
Al-Haqq Supplementary School – Yorkshire and Humber Structured supplementary provision to enhance the employability and post-16 progression to further and higher education for young people of Pakistani and Kashmiri descent.	£121,788
Antidote – UK wide Support over a 15-month period to enable new strategies for engaging schools with the PROGRESS Programme and sustaining Antidote's work.	£69,360
ARC Theatre – London Finding the Words will work with young women through film and public speaking, to give them a much-needed platform and voice in gang and youth violence-related issues.	£43,400
Be Together Ltd – West Midlands Young people from Stoke-on-Trent will improve their speaking, listening and employability skills and increase their aspirations by investigating North Staffordshire, and communicating their findings through a public exhibition and drama performance.	£46,500
Bilingual Learning and Teaching Association – Yorkshire and Humber Promoting appropriate bilingual support in mainstream settings for children with English as an additional language and engaging family members in supporting this at home and in the classroom.	£86,096
Chol Theatre – Yorkshire and Humber Imaginary Communities: A pedagogical approach to empower and re-engage children at risk of exclusion from school in Rotherham.	£58,000
Council for Learning Outside the Classroom – UK wide Contributions to core costs over a three-year period to this key national body as the Council builds sustainable income streams and demand for its products, to reach a position of long-term sustainability in 2014.	£250,000
Dandelion Time – South East Delivery and dissemination of an experiential programme for traumatised children with emotional or behavioural difficulties and facing risk of exclusion or withdrawal from school.	£74,065
Development Education Centre (South Yorkshire) – Yorkshire and Humber Building Communities Through Dialogue to reduce truancy and behavioural problems at transition from primary to secondary school by strengthening young people's ability and confidence to communicate with people from different backgrounds.	£107,948
FOCUS Charity Ltd – East Midlands Funding for Explore Leadership, a programme created for young people to empower their peers to identify, plan and deliver projects which directly benefit their local community.	£105,000
Forest Bus Ltd – South East An intervention programme for families to work together to overcome problems which impact on their ability to live a more rewarding life.	£46,512
Friendship Society – London Journeys of Discovery: Improving Russian language teaching/ learning by linking three supplementary schools with a mainstream primary and secondary school.	£5,000
Gateshead Metropolitan Borough Council – North East A three-year programme to develop the speaking and listening skills of young people with learning disabilities and/or difficulties in Gateshead, via work experience with local employers.	£108,948
Inclusion Trust – Multi-regional The intergenerational use of social networking to simultaneously develop speaking and listening skills in young people, and ICT empowerment in the aged.	£80,000

Institute for Philanthropy – Northern Ireland Launch of the Youth and Philanthropy Initiative in Northern Ireland, to pilot in 15 schools over three years, giving young people a ‘hands-on’ experience of giving whilst developing their communication and presentation skills.	£154,250	Somali Community Parents Association – East Midlands A two-year pilot of a year-long programme to support Somali young people in developing their speaking and listening skills and carrying out projects to help tackle key issues within their local communities.	£129,670
Institute for Public Policy Research – Multi-regional Bringing together leading educationalists to contribute ideas to a Manifesto for Schools to narrow the attainment gap, producing a set of innovative and radical policy proposals reviewed by a ‘practitioner panel’.	£41,600	Soundart Radio Ltd – South West Core staff and consultancy support to facilitate development of a revised business model.	£68,900
Languages Sheffield – Yorkshire and Humber A three-year project to raise the attainment of bilingual pupils by enabling mainstream and supplementary schools to develop partnerships to support pupils’ language learning.	£135,000	Space Unlimited – Scotland Work with 18 schools in three Scottish local authorities to establish a sustainable model where student voices become a powerful tool to support whole system change.	£222,912
LIFT for Learning – UK wide A three-year England and Wales scale up of DigiSmart, an engaging literacy and ICT intervention targeting 20,000 at-risk Year 5 students focusing on low primary-age literacy and increased likelihood of truancy and exclusion in secondary school.	£237,465	Speakers’ Corner Trust – UK wide Expressing Citizenship will help young people learn self-expression, building common cause and influencing others to play a fuller role in society, and disseminate resources nationally.	£74,500
National Centre for Young People with Epilepsy – UK wide An in-depth study to generate learning and good practice relating to better supporting young people with epilepsy in mainstream schools and ensuring their full inclusion in learning, the curriculum and the wider life of the school.	£58,500	Studio Schools Trust – UK wide To fund Studio Schools’ new model of the state school offering immersive, work-based learning and enterprise.	£120,000
National Literacy Trust – Multi-regional National scale up of Words for Work, a work-related learning and communication skills programme for schools, supported by employee volunteers.	£200,000	The Child-to-Child Trust – London Piloting the Child-to-Child participatory approach in school to help empower and integrate refugee and asylum-seeking young people.	£10,000
One True Voice – London Developing and testing a 16-week model of sex and relationships education for 40 young women aged 13–20 within Islington’s Somali community.	£5,106	The Communication Trust – North West Feasibility study to help understand how best to involve, protect and support young people, and to further develop our understanding of the potential impact of the Communication Leaders initiative.	£6,900
Openstorytellers – South West A three-year intervention programme to develop the ability of young people with complex communication needs to construct and share personal narratives and to use these to improve their participation in democratic processes.	£90,000	The Forgiveness Project – UK wide To produce a dynamic, multimedia, cross-curricular educational resource that explores young people’s own understanding of and stories about conflict and reconciliation.	£30,155
People and Planet – UK wide To raise awareness and develop speaking and listening skills and confidence of students in colleges to enable them to take action to achieve positive change locally and beyond.	£75,303	The Hackney Pirates – London An enterprising out-of-school learning programme where young people receive one-to-one attention to improve their literacy and creativity by working on real-world creative products.	£142,544
Playing For Success South West – South West Feasibility study and partnership building to develop a speaking and listening initiative across study support centres linked to sports clubs.	£9,000	The Salmon Youth Centre in Bermondsey – London Piloting a replicable media training project within a South London Youth Centre, to develop young people’s speaking and listening skills. Participants will lead development of the centre’s own communications strategy and be offered work experience opportunities in the wider sector.	£70,826
Radio Regen – UK wide A two-year national partnership project to increase the number of community radio stations providing high-quality speaking and listening skills for 11–19 year olds, and to build a wider awareness of community media opportunities among schools and youth centres.	£112,448	The Traditional Arts Foundation – West Midlands A one-year pilot to systematically trial a progression route of storytelling-led speaking and listening training and opportunities for young people aged 13–19 in three schools and one community setting across the Midlands.	£26,670
Rathbone – UK wide Tweet-A-Tale is a nationwide creative arts-based project that will encourage community connection and the development of verbal and ICT literacy of marginalised young people.	£155,885	Tower Hamlets Summer University – London Core support for the organisation to achieve longer-term sustainability.	£146,500
Red Balloon Learner Centre Group – UK wide A two-year pilot of a virtual school to enable Red Balloon’s exemplary recovery programme for severely bullied (and self-excluding) young people to reach more young people and prove its viability.	£85,000	Time for Families – UK wide Developing the speaking and listening skills of young people in prison in England and Wales to strengthen communication and reduce conflict between the young people and their parents/carers.	£90,000
Somali and Somaliland London Community – London Assisting SSLC to adopt a more mainstream UK approach using activity-based learning driven by the pupils rather than traditional Somali methods.	£64,242	Young Person’s Advisory Service – North West YPAS Peer Supporters develop communication skills of pre-excluded young people, to facilitate community discussion groups, to improve relationships in school and at home, preventing exclusion.	£78,443
		Youth Clubs Hampshire and Isle of Wight – South East To set up a project where young CAT mark assessors can gain the skills necessary to train other young people as assessors. CAT marks are awards for service delivery granted by service users.	£82,500
		Open Grants total	£3,936,936
		Education and Learning programme total	£4,934,647

Youth reps from User Voice's What's Your Story project in a private session at the House of Lords. User Voice, an ex-offender led charity, works with people who have had contact with the criminal justice system to ensure that their voices are heard in decision-making processes, nationally and locally. Here, the youth reps, elected by their peers out of hundreds nationwide, give evidence to parliamentarians including Crispin Blunt, Under Secretary of State for Prisons and Youth Justice.

Social Justice





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Social Justice programme

Report

The Social Justice programme has a focus on supporting innovative responses to the challenges faced by young people at a time of economic uncertainty and rapid social change. It aims both to help those who are more marginalised and unable to access appropriate support, and to elevate their voices to have more influence over local and national decision-making.

Our funding is not limited to a particular sector, client group or approach, but spans employability, education and training, refugees and migrants, gangs, youth offending, health and disability. It is intended to help people experiencing discrimination, violence, intolerance or limited opportunity.

Focus on innovation

During 2011/12, the combination of economic recession and cuts to services has had a profound and negative impact on young people. Youth unemployment has grown universally but although commentators speak of a 'lost generation', the impact and longer-term effects will be felt more deeply in some social groups and geographical areas. The impact on young black men is a particular concern, as are the consequences for the mental health of young people more generally.

Many of the organisations working with these young people have had to scale down operations and staff. Some face closure. Although challenging, one response is to consider innovation – either by changing ways of doing things, or by doing different things entirely. We wish to help with this, and have supported organisations, through our Open Grants and Special Initiatives, to develop new forms of service or business models, or collaborative approaches.

Examples include Voice UK, which is pioneering approaches to supporting very vulnerable young people who have experienced crime or abuse; Interest Link, which has developed a befriending service to help young people with learning disabilities in the Scottish Borders; and 198 Contemporary Arts and Learning, which is trialling arts approaches to support integration of young Roma.¹

Youth participation

Youth participation is a core value for us, and government's increased emphasis on recognising and developing 'community assets' may lead to further recognition of the contribution young people can make. That said, the prevailing public discourse about young people is negative, unfairly depicting them as feckless, criminal, and a threat to society. This view was given new life during the summer riots in England but more thoughtful analyses have concentrated on better supporting young people to escape intergenerational poverty and hopelessness. Listening to and involving young people in solutions to such problems is something we have supported, and will continue to support.

This year we helped Brook – which gives young people free and confidential sexual health information – to take a 'whole organisation' approach to embedding youth participation. Revolving Doors, which supports those caught up in crime, drugs and homelessness, has further developed its young service user forum, members of which engage directly with policy-makers.

At a sector level, our further support for the Clore Social Leadership Programme seeks to deepen the impact that leaders committed to youth empowerment have across the UK. We are delighted to be supporting Sam Anderson and Jacqueline Williamson, founders of The Junction in Leith and Kinship Care in Northern Ireland respectively.

¹ See the grants listings on p. 41 for more details and further examples

Where we think wider impact can be achieved, we will consider helping our grantees with aspects of organisational development – perhaps by supporting development posts, improving evaluation and understanding of impact, or developing and testing new business models. Our grants officers support, challenge, make introductions, and offer opportunities for peer learning or support for grantees. In this way we hope to contribute to the resilience of grantees, helping them weather the challenging funding conditions.²

This year, Runnymede Trust and Refugee Youth have both been helped to bring in support to reshape their operations, helping them improve the chances of ongoing impact and sustainability. Dance United and Tender are being helped to build on past success, by developing new business models and income streams that will help them in the long term.

New Special Initiative

This year we launched a Special Initiative designed to provide support for children and young people with irregular immigration status. The Foundation has supported refugee and migrant organisations for many years, but recently we have become more concerned about those young people who come to the UK and – often through no fault of their own – find themselves unable to return to their home countries, yet unable to work, study or even access the most basic services here. We are also concerned about the children of such migrants who are ‘undocumented’ and will face legal and other challenges on reaching majority.

Our Supported Options Initiative is a partnership with Unbound Philanthropy, and develops out of research we commissioned Oxford and City Universities to undertake – ‘No Right to Dream’.³ We will fund innovative advice and information services for young people in this position, including approaches using digital technology. We will also look closely at whether and how charitable foundations and others might contribute to supporting young people who may wish to consider a return to their country of origin. This is politically sensitive, but our view is that we must engage with the challenge of making this

‘option’ for young people viable, appropriate and humane. Throughout this work we aim to bring to the attention of a wider audience the lived experiences of these young people that are so vulnerable to exploitation and criminality, yet whose voices are so rarely heard directly.

We have also been part of a multi-funder collaboration working together to change the hearts and minds of the British public on immigration. Changing Minds is an informal, action-orientated network of foundations. The collaboration emerges from a shared concern about hostile attitudes to newcomers to the UK, and in our case young migrants in particular.

We recognise that collaboration can be a means of achieving greater impact, through pooling resources and ideas. We continue to participate in the Corston Independent Funders’ Coalition, which is concerned about vulnerable women in the criminal justice system. Together with the Ministry of Justice, the Coalition runs the Women’s Diversionary Fund, which has made awards across England to support specialist, holistic, community-based services (Women’s Centres), built infrastructure to help develop those services, and begun work on an evidence base to identify the value of this way of working with vulnerable young women.

With other funders, we are also contributing to new approaches to increasing the financial resources available for effective service delivery. One example is the Social Impact Bond being used to finance interventions with young offenders in Peterborough.

The next 12 months

Over the next year we will begin a series of events to bring grantees together to offer mutual support and the exchange of ideas about practice, organisational development, and achieving impact. We will also spend part of the year taking forward our development work around criminal justice, with the aim of establishing a Special Initiative on girls and young women who are either in, or in danger of entering, the criminal justice system.

² ‘Grants plus’ funding of this kind is a theme within each of our programmes and an area we have been working to develop during the past year. See Director’s report, pp. 4–5

³ The ‘No Right to Dream’ report can be read online at the Foundation’s website

Social Justice programme

Special Initiatives

Supported Options Initiative

Special Initiative for children and young people with irregular immigration status, in partnership with Unbound Philanthropy

£713,852 in 2011/12

The Supported Options Initiative funds innovative approaches to getting trusted, independent advice and support to children and young people who have irregular immigration status.

Young people without regular immigration status may have been refused asylum but are unable to return home, may have overstayed visas, may have no papers, or may have been born here to parents without regular immigration status. Whatever the cause of their situation, they are often marginalised and may be vulnerable to exploitation or harm. A lack of legal status limits their choices and makes them more likely to be denied their rights. They are vulnerable to poverty, poor physical and mental health, exploitation and abuse.

Challenges for these young people vary considerably but include misunderstanding of their legal status and entitlements, a desire to avoid detection by the authorities, lack of appropriate services, mistrust in those that are available, isolation and a lack of social networks and support. They lack the sort of 'supported options' that other young people are entitled to and able to access, to help them overcome difficulties such as homelessness, poor physical and mental health, abusive relationships and mistreatment in the workplace.

Most mainstream advice and support organisations have limited knowledge of these young people and are unable to offer much support. Some existing organisations are aware of the vulnerabilities and needs of these groups, but are unable to support them because of a lack of funding and capacity. Publicly funded sources of advice and representation are increasingly scarce (a situation likely to worsen with proposed changes to legal aid) and services express concern that they are unable to meet the complex needs of these young people.

This Special Initiative aims to:

- Enable young people to access quality and holistic advice and support to help them make informed decisions, cope in crises and times of transition, and plan their futures. We hope to support a minimum of 600 young people a year
- Support migrant, youth and advice organisations to better understand, respond to and reach out to young and child migrants
- Capture and share the learning from this work to improve practice and influence policy

The first strand of work in the initiative is to fund a range of projects to deliver support and advice to individual young people over two years. We are delighted to have begun funding a hugely impressive mix of organisations in this pilot work: The Children's Society; Coram Children's Legal Centre; Coventry Law Centre; Islington Law Centre; Praxis Community Projects; and the Refugee and Migrant Centre in Wolverhampton.

A second strand of work, also begun in 2011/12, is to commission an inquiry into the options for better use of digital technology in supporting undocumented young people. On Road Media, an organisation that specialises in helping very marginalised groups develop a social media presence, ran an Innovation Camp at our offices in July 2012 to develop new ideas for allowing these young people to access help and support without compromising their own security.

A further strand of work in the initiative will be to develop our understanding of the advice needs of young people facing return (assisted or forced), and commission one or two projects to support young people leaving the UK.

The Institute of Voluntary Action Research is our evaluation partner in the initiative and will support us and grantees to maximise the learning potential in all this work.

Right Here

Mental health Special Initiative in partnership with the Mental Health Foundation

£231,277 in 2011/12

Right Here is a £6m initiative, developing new approaches to supporting the mental health and wellbeing of 16–25 year olds. It is jointly managed with the Mental Health Foundation and runs until the end of 2013.

The initiative works with four partnerships – in Brighton and Hove, Fermanagh, Sheffield and Newham – to create effective and appropriate support for young people at risk of developing mental health problems. The partnerships also seek to raise awareness of mental health and help tackle the stigma associated with mental illness.

Youth engagement is a core part of each project's approach. Young people work with professionals to design and deliver new activities, contribute to the management and governance of the projects, and take part in peer research. Our aim is that the most successful approaches developed through Right Here will eventually be taken up more widely so that the mental health needs of 16–25 year olds are finally recognised and addressed in ways that will appeal to and help them.

This year, the second year of the projects' delivery, saw some promising signs of positive impact, for the young volunteers who have such a stake in the work, and for young people getting involved in Right Here activities. The Tavistock Institute, which is evaluating the initiative, reported that "involvement in youth panels and volunteering was seen as widely beneficial". Young people are becoming more confident, feel better supported, understand mental health much better, and have learned valuable new skills.

For further details see www.right-here.org.uk

Special Initiative in development

Girls and young women in the criminal justice system

£10,151 in 2011/12

Over the past year we have been exploring the value of developing a new criminal justice Special Initiative focused on girls and young women.

The findings of our criminal justice review, and our continued membership of the Corston Independent Funders' Coalition – 21 independent funders working collectively to press for implementation of the recommendations in Baroness Corston's review of adult women in the criminal justice system – have made us increasingly aware of the challenges facing girls and young women in the youth justice system or at risk of entering it.

While we are beginning to see positive change for women through Corston, the distinct needs of the 45,000 girls and young women in the youth justice system are still being overlooked and misunderstood. This appears to be an area where a focused programme of work could make a real contribution.

Towards the end of 2011 we commissioned an external review of the issues in this field and ran consultation events with academics, policy-makers, practitioners, grantees and former service users. In autumn 2012 we plan to carry out a further consultation to better understand the Scottish context.

Our findings so far have reinforced our view of the need for action in this area, which we anticipate will continue to grow. The youth justice system is undergoing radical change and with cuts in spending and increased economic hardship the expectation is that more girls and young women will become vulnerable to disadvantage and drawn into the justice system. During 2012/13 we will be continuing our engagement with critical partners as we work to develop the possible shape and content of a Special Initiative.

"I do feel more confident. It has given me more understanding about mental health. It's helped my self-esteem. Knowing more about it and how it affects other young people. About a year ago I wasn't getting out of bed or leaving the house. Now I feel in a different place."

Right Here project youth panel member

Social Justice programme

Open Grants scheme



Changing Tunes

The head of security at HMP Winchester plays drums at a post-release rehearsal for a group of ex-prisoners in Winchester, supporting the rehabilitation and resettlement of young offenders through music

The Social Justice Open Grants scheme aims to help integrate marginalised individuals and communities. We see integration as a two-way process in which society at large and specific communities adapt, understand and benefit.

We want to support younger people up to the age of 30 who are at a time of transition because of their circumstances (such as leaving care or prison or settling into a new community) or changes to the cultural environment in which they live (such as established communities in refugee dispersal areas).

The Open Grants scheme focuses on arts and learning activities that enable marginalised young people to have their voices heard and ensure their fuller participation in society.

If possible, the outcomes of funded activities should also build strong relationships within and between communities, and foster respect for, and understanding of, the differences between communities.



The Reader Organisation

Group members of the Get Into Reading project take part in a weekly read aloud session to bring marginalised individuals together and promote literature

Grant awarded in 2011/12

Changing Tunes

£226,707 over three years

Accompanied by a couple of guitarists, a keyboard player and a drummer, an ex-prisoner cups the microphone and belts out several verses of emotive lyrics to a 300-strong audience. Between songs he declares, "I have a huge debt of gratitude to the guys at Changing Tunes for helping me to get out of the pit I was in. With their support I found something creative inside me rather than something destructive."

Changing Tunes is a relationship-based charity that uses music to build self-esteem among prisoners and ex-prisoners. Specially trained musicians work with small groups in 13 prisons in South West England, teaching all musical genres. Re-offending rates have dropped from a national average of 61 per cent to 15 per cent amongst those who participate in the project both pre- and post-release.

The charity is one of very few organisations that work 'through the gate' with prisoners – the same staff working with them both before and after release. "We continue our relationships and introduce ex-prisoners to a local music scene," says director Tim Snowdon. "Playing in front of a receptive audience, maybe in a church, builds self-esteem enormously. They feel accepted into a local community and so are more likely to follow its rules."



Llamau

A young person from Newport and her caseworker under the Emphasis Project, an assertive outreach programme providing support to excluded young people at risk of homelessness

An earlier PHF grant helped Changing Tunes to develop its innovative project, and now a follow-on grant will fund expansion into 70 per cent of UK prisons. “We’ve had a genuine working relationship with Paul Hamlyn Foundation,” says Tim. “Not everything goes well all the time and when part of our programme was delayed, PHF advised and supported us to adapt our approach. With this sort of constructive dialogue with our funder we have now managed to surpass our original target of beneficiaries.”

The charity will expand into six regions through self-contained franchises that will manage themselves and fundraise autonomously. “We didn’t want to grow into a big charity with all the associated overheads,” says Tim. “By taking the franchise route we can stay lean and keep the entrepreneurial spirit that has served us well. Prisoners are constantly moving around the system, and could be released anywhere in the country. Having musicians in more prisons will mean we can maintain our contact and, more importantly, have local musicians who can continue our post-release work.”

New and ongoing grants

Scottish Refugee Council
£150,000 over 30 months

Legal Services Agency
£181,100 over three years

The Scottish Government has been keen to support the increasing numbers of children seeking asylum without parents or legal guardians. Frightened teenagers – as young as 14 and some the victims of trafficking – arrive from countries such as Afghanistan, Nigeria and Iran, not knowing who they can trust. Local authorities have a duty of care but sometimes have neither the expertise nor resources to meet the needs of these vulnerable newcomers.

Receptive to Scottish Refugee Council’s (SRC) calls for action, politicians agreed to back the creation of the Scottish Guardianship Service after hearing of the issues first-hand.

“We organised a group of young people to talk directly to the Government about the problems they face not just around immigration but with all aspects of their integration,” says SRC’s Clare Tudor.

The pilot Scottish Guardianship Service – also supported by PHF and the Big Lottery Fund – was set up by SRC in September 2010 to run for 30 months. In partnership with the children’s charity, Aberlour, the service allocates all unaccompanied asylum-seekers with a guardian who supports them through the immigration process and offers advice on welfare and wellbeing issues.

One child, quoted in the first annual assessment of the pilot, said: “I am shy and really scared. We don’t know nobody because it is first time. She [the guardian] explained to me her job and after a couple of meetings I began to understand how she help me.”

“We make this very complicated, legalistic process as smooth and as child-friendly as possible,” says Clare. “If the agencies need to be challenged over their provision, then the guardians will do that. The young people actively partake, at their own pace, and always know what is happening.”

A parallel PHF grant has been awarded to the Glasgow-based Legal Services Agency (LSA), which is supporting the Guardianship Service.

“We had already set up a women and children’s section within the agency which primarily deals with issues around gender-based violence,” says LSA solicitor, Kirsty Thomson. “But the Guardianship Service identified a gap in the provision of legal advice addressing the more complex needs of the children it was assisting, and some serious concerns that we couldn’t ignore.”

The LSA has taken on specific cases that test existing law and challenge statutory agencies dealing with unaccompanied children. “We took on a complicated case involving the age assessment of two boys as a piece of strategic litigation,” says Kirsty. “It highlighted our need for external help and funding – we just didn’t have the capacity to work in such depth on issues specifically affecting migrant young people within the existing department. Our PHF grant has now allowed us to set up a new project specifically giving legal advice to migrant young people, which dovetails perfectly with the Guardianship Service.”

One issue that both Kirsty and Clare pick up on is the fact that the Guardianship Service identified several young people who were under the radar and outside of the major Scottish cities. Several of these cases involved young people who had been detained despite potentially being the victims of trafficking. Whilst the guardians could offer advocacy support, they were aware that the young people required high-quality specialist legal advice and were able to refer the young people on to the Legal Services Agency’s dedicated project.

Now working more closely together, SRC and LSA both benefit from this joint approach. “We feel that together we are a formidable team, strongly advocating for the rights of separated children and for a greater understanding of their needs,” says Clare.

Ongoing grants

SignHealth

£120,000 over 33 months

Statistics show that one in four women and one in seven men are victims of domestic abuse at some time in their lives. Although there is no data amongst the deaf community there is anecdotal evidence that suggests abuse here is much more prevalent – some say possibly as high as 50 per cent.

“The high incidence is due to a number of factors,” says Rachael Williams, project worker at SignHealth, the national charity campaigning for health and wellbeing equality for the deaf community. “There are barriers to reporting abuse, and a lack of suitable information,” she explains. “Some in our community are actually unaware that what they are experiencing is wrong, a criminal offence.”

She continues: “In one deaf school, while working with 34 pupils over just a six-week period, we had eight pupils disclose incidents of abuse or victimisation, which indicates the scale of the problem.”

Agencies such as the police and social care have shown a lack of understanding of this issue. “For example,” says Rachael, “the police have a text equivalent to the 999 call but you have to register before you can use it, which is inappropriate in many critical domestic incidents.”

A PHF grant funds SignHealth’s new Young Deaf Hope project to support and inform young deaf people who, in almost all of the UK, have no access to skilled, specialist social care. “Our aim is to visit schools and youth groups, and provide information in the visual language that young deaf people can understand,” says Rachael. Post-16 young deaf people are more difficult to engage effectively. SignHealth is using its existing networks to promote workshops for 18–30 year olds in deaf clubs, and is taking its message to colleges and universities.

“Throughout the project we’ll also be lobbying government,” says Rachael. “Its own website has some fantastic resources – three online videos, in particular – but they are neither subtitled nor signed and so are totally inaccessible.”

In a sector which has found fundraising challenging, PHF’s grant will allow the project team to collect data across a pilot area of London and the South East, and provide evidence to other funding bodies of the importance of this intervention.

Llamau

£150,000 over three years

Already known for its support for over-16s at risk of homelessness, the South Wales charity Llamau wanted to do more to help younger children. It understood that problems can start at an early age and that timely intervention with vulnerable young people and their families can avert a crisis.

“The idea behind the Emphasis initiative was to set up an assertive outreach project with 14–19 year olds to try and prevent them becoming homeless in the first place,” explains team leader Sam Deere. Three caseworkers work intensively with hard-to-reach young people who do not readily engage with statutory services.

“Most agencies will stop support if their clients fail to keep appointments or if they refuse to cooperate,” says Sam. “If we were going to be effective we had to be assertive in our approach, which means we meet the young people wherever they want and will do whatever is required to build up a relationship with them and their families.”

Once on board, the Emphasis team devises a 12-week plan, which can include access to some of Llamau’s other services such as family mediation and educational provision. They might help the young person access support from statutory services such as mental health or addiction treatment.

Llamau’s latest annual report highlights a 15 year old girl who was adamant she would leave home at 16. Her mother was having addiction treatment from a mental health charity and had been a victim of domestic abuse. The daughter, who was not attending school, looked as if she would follow a similar path, smoking cannabis and involved with an abusive boyfriend. The Emphasis team intervened, counselled mother and daughter, secured appointments with a local substance misuse service, a domestic abuse counsellor and careers advisor. The young woman is now on a training course, keen to continue into further education, and is settled at home with a renewed relationship with her mum.

PHF’s funding for the Emphasis programme includes helping Llamau to measure its effectiveness. “At the moment we offer this service for free,” says Sam. “But for the project to continue, we need to be able to demonstrate the cost-saving benefit of our early warning scheme and encourage the statutory agencies to invest in it.”

Social Justice programme

Grants awarded in 2011/12

Special Initiatives

Girls in the Criminal Justice System

Support costs	
Development of a new Special Initiative including consultancy and 'Girls at Risk' consultation event	£10,151

Supported Options Initiative

The Children's Society	£100,000
Coram Children's Legal Centre	£100,000
Coventry Law Centre	£120,000
Islington Law Centre	£120,000
Praxis Community Projects	£120,000
Refugee and Migrant Centre Ltd	£120,000
Support costs	
Development of pilot advice and information services to benefit young people with irregular immigration status, combining outreach work, partnership working and innovative approaches to service provision	£33,914
	£713,914

Right Here

Support costs	
Salaries for programme leadership; research and evaluation; capacity-building through consultancy and mentoring of young people	£231,277

Special Initiatives total **£955,342**

Open Grants

198 Contemporary Arts and Learning Ltd – Multi-regional A project exploring identity and cultural heritage of Roman and English Romany to increase community integration.	£45,159
Brook Advisory – UK wide To increase young people's active involvement in Brook, promoting youth leadership to change and secure sexual and reproductive rights.	£138,792
Centrepoint – North East The Youth Educators' Project is a peer educators project in Northumbria that trains and supports ex-offenders and young parents to deliver homelessness prevention programmes to vulnerable young people in schools and custody, and service deliverers.	£149,399
Changing Tunes – UK wide Development of three regional franchises to expand capacity for the support of the rehabilitation and resettlement of young offenders.	£226,707
Clean Break Theatre Company Ltd – Multi-regional Gender-specific, holistic support, skills development, accredited training and progression into employment for girls and women offenders and those at risk of offending, on-site and in prisons.	£150,000
Clore Social Leadership Programme – UK wide Funding for up to three specialist Clore Social Fellows with particular interest in supporting excluded young people, and/or drawn from a marginalised community.	£105,000
Community Foundation for Northern Ireland Support for the EFC Conference, Belfast, 6–8 June 2012.	£5,000
Council for Dependency Problems – Yorkshire and Humber Advice, support and training for newly arrived migrants and their communities, including a pilot mentoring scheme providing support to service users with substance-related problems and their families.	£70,072
Crisis UK – South East Three years' funding for the delivery of support services for young homeless people in a multi-function building in Oxford.	£200,000

Dance United – Multi-regional Core funding to support Dance United's next stage of development, developing Academies into wholly owned community interest companies within a federated structure.	£250,000
Grassmarket Project Ltd – UK wide Support for engaging socially excluded young people.	£10,000
Interest Link Borders – Scotland A three-year volunteer befriending service for around 100 children and young people with learning disabilities in the Scottish Borders.	£115,000
Legal Services Agency – Scotland A new legal advice service for refugee and migrant children and young people (up to age 25) in Scotland.	£181,100
LGBT Youth Scotland – Scotland Support for a national LGBT young people's participation and policy project, jointly funded by the Scottish Government Equalities Unit.	£150,000
Move On Ltd – Scotland Peer-mentoring support for young people experiencing the transition from care.	£88,808
New Economics Foundation – Multi-regional Support to develop a blueprint for transforming services for young people using co-production and outcomes-based commissioning.	£149,000
Oval House – London A participatory arts intervention supporting those at risk of social exclusion and offending, focusing on early intervention, workforce development and a national practitioner network.	£150,000
Prisoners' Education Trust – Multi-regional Core funding to enable PET to extend its Learning Matters project into a second three-year phase. Through a new Prisoner Learning Alliance, PET will advocate for better provision for prisoner learning.	£105,000
Red Rose Chain – East of England The creation of a community drama company for recovering Class A drug addicts, embedded within a professional theatre company.	£150,000
Refugee Youth – London Support for young refugees to explore issues affecting them and engage with service providers, policy-makers and the public.	£124,901
Revolving Doors Agency – Multi-regional Continued support for the development of RDA's National Service User Forum and Young People's Forum, which promote and strengthen the ability of service users and ex-offenders to influence policy.	£190,000
Tender Education and Arts – UK wide To expand the reach of Tender's violence-prevention models nationwide, using a franchise model of self-sustaining projects.	£129,302
The Runnymede Trust – UK wide Support to develop a new business model to enable the organisation to adapt to the new context of reduced government funding.	£65,000
Tyne and Wear Archives and Museums – North East To provide young unemployed people with volunteer placements in cultural organisations alongside a structured employment programme.	£132,000
UK Drug Policy Commission – Multi-regional Changing times: a review of the potential impact on drug problems of changes to young people's services amid localism and austerity.	£9,880
User Voice – Multi-regional Provision of a staff training and support programme to develop the capacity of an ex-offender workforce to develop and promote service-user participation in criminal justice policy and practice.	£145,821
Voice UK – Multi-regional A programme of youth-led work to support learning-disabled young people address abuse and crime against them.	£110,000
Open Grants total	£3,345,941
Social Justice programme total	£4,301,283

A young learning-disabled boy from the Gop block of Puri District, Odisha, a rural part of eastern India, with his care worker (right) and mother (centre). In a region where facilities for disabled children are hard to access, PHF grantee Vikash places multipurpose rehabilitation workers within local districts to provide support for young people in their homes, simultaneously providing training for parents and other carers.

India





India programme

Report

Even though the last few years have seen a very impressive growth rate of 8 per cent plus in India, the situation relating to poverty remains a serious issue. Growth has not ensured equity, so while there is a growing middle and upper-middle class in the Indian population, the poorest continue to suffer and in many cases end up being worse-off, as growth is achieved on the back of their land, resources and labour.

Policy frameworks are unfortunately biased in favour of the better-off and while there are many programmes that aim to address poverty, they fail to incorporate the concerns and aspirations of the poor and are rarely well implemented. Social sector investments such as education and health have failed to reach the most vulnerable people, thereby curtailing their potential.

The complex nature of the social development challenge in India requires new ideas, innovation and learning from across a range of interventions if there are to be improvements in policy and practice. The Foundation's India programme makes a small but significant contribution by funding sincere and concerned NGOs to reach out to some of the most vulnerable communities and explore alternative approaches to social development.

Over the course of 2011/12, the India programme has supported social development initiatives with eight different NGOs across the country. This is lower than last year, due to there being only a single round of grant-making, rather than the customary two. Because of constraints in scheduling our March 2012 committee meeting, decisions on a number of grants were pushed back to the next financial year, taking them outside of the purview of this report.

Our Open Grants were made across development sectors, maintaining our philosophy of supporting well thought through and relevant project ideas. The grants were made in the broad areas of governance, education, health and disability, violence against women and ensuring rights and entitlements of poor communities.

Our activities in the Eastern region have grown further, as has our focus on the central part of the country, which comprises some of the poorest and most vulnerable areas and communities. An additional consultant has been appointed to look exclusively at projects in the central region of India. To further strengthen the governance and financial systems of NGOs, a panel of audit firms has been enlisted which, in addition to overseeing the effective utilisation of grant funds, will take the finance and management teams of the NGO through an *in situ* training and capacity-building process. It is now mandatory for each of our partners to go through this exercise as we aim to enhance standards of governance and improve financial systems in the NGOs we fund.

During the year a review of the India programme was completed by New Philanthropy Capital. They reported a high level of confidence amongst partners and the NGO sector towards the Open Grants scheme and support provided by the Foundation. In order to make a larger impact the report suggested that PHF should have certain explicit aims and actively address wider sector concerns such as governance and management of NGOs. Some work to this effect has already been described. Based on the report's recommendations and the programme's own experiences, we have begun the development of a new programme strategy for the period 2012–17.

India programme

Open Grants scheme



Shishuadhar – For the Child

An activity class for children of prisoners and disabled parents, part of a family-based project to provide an alternative to institutional care



PRADAN – Professional Assistance for Development Action

An agricultural plot developed as part of a livelihood support programme in Mayurbhanj district in Odisha



BMVSS – Bhagwan Mahaveer Viklang Sahayata Samiti

Work at the BMVSS factory in Jaipur, Rajasthan, creating artificial limbs for amputees and polio patients

The India Open Grants scheme works with non-governmental organisations that help the most vulnerable groups in India. Organisations supported within the India programme have to be local Indian NGOs with Foreign Contribution Regulation Act (FCRA) registration.

Grant awarded in 2011/12

Vikash

Rs. 2,354,700 (£31,126) over one year

Children with disabilities (CWDs) in many parts of the developing world are still largely isolated from mainstream society. In India, while some CWDs in urban areas have access to education, assistive devices and therapeutic services, the large numbers living in rural areas have little or no access to such services. Their families are mostly unaware of how to manage their disability and of the possible schemes and programmes that can be accessed from the Government.

The Government has initiated efforts at inclusive education through community-based multipurpose rehabilitation workers (MRWs) but this has had limited success as such workers are unable to understand all forms of disability. Schools lack materials or equipment and in many cases even proper access for CWDs or trained staff to assist them. These issues are accentuated in rural settings.

Vikash, an organisation based in the eastern Indian state of Odisha, has several years of experience of working with children and adults with disabilities. Established in 1986, it has a long record of work with leprosy patients. Vikash undertakes an approach which believes that communities are key partners in the change process, and that development of local capacities is a key component for community-based assistance to children with disabilities.

Supported by PHF, Vikash has begun work in 12 *gram panchayats* (local representative bodies) in the Gop block of Puri District, Odisha. Eight hundred children with disabilities have been identified and will be covered during the course of the project. The PHF assistance will help them cover the entire block with services. The strategy involves placing MRWs in the *gram panchayats* along with a team of therapists comprising experts on visual, hearing, physical and mental disabilities. Therapists develop a plan for each child covering therapy, care and management, and maintain periodic contact with the children. The MRWs follow this up with daily visits to the children, monitor the plan and ensure

that the mother or guardian is following up with the home support elements of the plan. Each of the children identified will also be linked up with government programmes to enable them to access their entitlements.

With almost 100 per cent coverage of a development unit, the project will be able to inform policy on how a structured intervention based and evolved with the community can address the development of children with disabilities in a rural setting.

Ongoing grant

Samaj Vikas Sanstha

Rs. 714,000 (£8,925) for one year in 2009/10, followed by Rs. 3,073,000 (£40,973) over two years in 2010/11

Violence against women is common across India, and transcends region, caste, class and ethnic group. In areas that are backward and feudal, such as the Marathwada region of the western Indian state of Maharashtra, where child marriages are common and poverty is endemic, lower caste women are especially vulnerable.

The Foundation has funded Samaj Vikas Sanstha (SVS) over a three-year period to address this issue. Following a thorough analysis of the situation, comprising a review of the laws pertaining to women and their rights and a primary study in 75 villages, a detailed implementation strategy was developed. The main initiatives were the setting up of *nari adalats* (women's courts) to quickly resolve pending cases, and four legal aid cells to support victims of violence and enable them to access the formal legal system. Volunteers were trained and assisted in identifying and encouraging women to question, challenge and shun violence.

The second phase has continued and through volunteers has been able to set up anti-harassment committees in 100 villages, federated at the block level. An additional focus has been the sensitisation and consequent involvement of government officials, the police department and members of *gram panchayats* to prevent violence through community action.

The project challenges traditional caste and patriarchal arrangements and, as expected, has resulted in opposition from men who find it difficult to accept the change. However, the processes that have been set into motion have given women the confidence to continue to challenge tradition and yet gain support from men.

The achievements have been significant. Notably, almost 100 cases related to violence have been registered and the women's courts have been able to resolve them to the satisfaction of both parties.

SVS has also begun publishing and distributing a monthly magazine called *Awaj Stree Astituvacha* (Voice for women's identity). It has a print run of over 2,000 and there have been eight editions published so far. The magazine is distributed in the programme villages, public health centres, children's daycare centres and to all members of the anti-violence committee and *panchayats*. The contents of the magazine include incidences of atrocities committed against women in the area, articles on women's issues, women's health, organisation of women and other relevant topics. The articles are mostly written by women who are members of the self-help groups and also the field coordinators of the organisation, teachers, journalists and students.

The project is ongoing and it is expected that by the time the project comes to a close, it will have created awareness on the issue of violence against women, legal and community systems to prevent it, and the momentum to sustain the action.

Completed grant

SAAD – Social Action for Association and Development

Rs. 683,000 (£8,538) for one year in 2007/08, Rs. 400,000 (£5,714) for eight months in 2008/09 and Rs. 2,090,200 (£26,128) over two years in 2009/10

Among the most vulnerable communities in the relatively prosperous state of Maharashtra are the *dalit* ('untouchable') communities, which have been traditionally dependent upon folk dancing and have had to depend on the charity of the more influential people of the area. These communities are also among the poorest, have no land or other productive assets and have had almost no access to education or other opportunities to help them build an alternative livelihood.

The condition of women and girls in these communities is distressing. Many young girls are married off to the local 'god' (*devadasis/aradhyas*) from where they end up as prostitutes. Others from traditional folk dancing communities (*Tamasha* is a traditional dance form here) have also degenerated into dancing in bars and into prostitution.

India programme

Grants awarded in 2011/12

PHF has supported SAAD in its work with this extremely vulnerable group. Over three and a half years, the organisation worked with *dalit* communities in 90 villages in the Parbhani district of Maharashtra to understand the issue from the perspective of women and address the causes and effects of discrimination and exclusion. It aimed to do this by forming women's self-help groups as a mechanism for them to come together, share their concerns and pool their strengths.

The project was able to build strong community groups and support them to help overcome their exclusion, and access welfare schemes and entitlements. The groups were also able to address the issue of violence and seek family counselling and legal assistance where necessary to claim their rights.

Almost 148 women have been supported to set up alternative livelihoods including small trading and running beauty salons. Some young women still find the theatre group as a means of livelihoods an attractive proposition. However, the self-help groups of *dalit* women have been successful in setting up a leather business and are now ready to expand it.

Simultaneously, to ensure a better future for children, SAAD facilitated the setting up of pre-school centres for the younger children. Over 800 children from the community have benefited from this initiative. As they have grown up they have been enrolled in regular schools with support to prevent them from dropping out. Thirty four older girls who had dropped out have been facilitated back to school.

The project has made good progress on all fronts. Strengthened self-help groups have been able to access loans and livelihood projects from the government, cases of domestic and other forms of violence have been counselled and taken to court where necessary, and the process has built a momentum which is keeping it going. Most crucial, however, has been the creation of 1,299 women leaders who have begun to exercise their rights to help themselves and their communities mobilise government support for projects relevant to them, play active roles in local governance and express their identity in public forums.

SAAD is an example of how funds from PHF have been effectively used, leading to the development of partnerships with like-minded organisations and leveraging support from other donors to keep the initiative going.

Open Grants

Aakanksha Lions School for Mentally Handicapped Support for a community-based rehabilitation initiative which involves the community and makes them aware of the special needs of people with disabilities. This is followed up by more intensive engagement with parents, to counsel them and train them with the skills and the confidence to deal with their disability and access referral services.	£21,923 Rs. 1,658,500
Chaupal Gramin Vikas Prashikshan Evam Shodh Sanstha Funding to set up health and nutrition surveillance committees to monitor food and health entitlement in 200 villages. Through resource centres on people's rights, Chaupal will ensure that knowledge on the Right to Information Act is available within the community and they are empowered to use it to undertake surveillance of services provided by the Government.	£26,623 Rs. 2,014,000
Child Survival India Continued support for the work of forming health groups and using these to link the community with the state's health services, and of running an emergency transport service for maternal health. CSI will also initiate programmes with men on their role in maternal and child health, and with traditional birth attendants on nutrition.	£49,230 Rs. 3,702,600
Digantar Support for Digantar to undertake the base research and knowledge generation for setting up the Centre for Participatory Research and Action on Teacher Knowledge. This initiative will take stock of the current knowledge available and link it up with research on practices in the field of teacher education, with the aim of developing both a pre-service and an in-service teacher education programme that works.	£72,386 Rs. 5,409,230
Gramin Punarrachana Kendra (GPK) Funding for a facility for HIV-positive orphaned children and to provide them with care and protection that will include psycho-social care, a safe place to stay, food, clothes, timely medical check-ups and an education. The grant will also equip the organisation to become an authorised government facility for care and treatment of HIV.	£8,433 Rs. 638,000
Independent Commission for People's Rights and Development (ICPRD) Continued support to the 'Men as Partners against Gender Based Violence' initiative. The funding will broaden the base of the initiative and develop 'Youth Forums for Gender Equality', which have played a significant role in reducing gender-based violence since the project started. The organisation will also develop a continuity plan for the initiative once the PHF grant comes to an end.	£68,518 Rs. 5,161,000
Ruchika Social Service Organisation A grant to assist RSSO to set up processes whereby out-of-school children from slums are identified, enrolled in the appropriate class in a Government school and provided with remedial education to help them cope with academic issues, thereby reducing the chances of dropout.	£43,635 Rs. 3,301,000
Vikash Support for Vikash to reach children with disabilities in an administrative block and provide a systematic diagnosis of the disability, a plan for therapy and rehabilitation. The therapy plan is custom-designed so as to be able to adapt to the conditions of the family and their home, and is facilitated in situ with the guardians of the disabled child working in close coordination with the NGO's outreach team.	£31,126 Rs. 2,354,700
Open Grants total	£321,874 Rs. 24,239,030
Exchange rate adjustments	£32,711
India programme total	£354,585

If it was straightforward to understand the impact of the sorts of work that foundations support and do, it would have been done by now. This year we began a new programme of work to create a fuller and more accurate analysis of the impact of our funding. This understanding, though difficult to obtain, is critical for organisations like ours – and our grantees.

Our mission is to maximise opportunities for individuals and communities to realise their potential and to experience and enjoy a better quality of life. This can involve addressing unpopular or challenging issues. We are interested in finding better ways to do things and in helping organisations to sustain and develop their work. With these values, it is important that we know whether we are helping to create impact in the areas we have chosen to target through our work and funding.

Further, we need to be able to make some informed judgements about whether this impact is good enough and whether doing things differently – or doing different things – would improve the contribution we make to the quality of life and opportunities for the people our grantees work with. This means not only assessing impact but also bringing together our understanding of how and why participants have been able to change things for the better, to help others to learn from our experience.

We believe that if we can shed some light on these questions, learn from what we find and report publicly on the impact of what we do, we will also be putting into practice the sort of accountability, and the focus on learning and outcomes, that we look for in our grantees.

Evaluating the impact of PHF's funding brings considerable challenges. As is obvious from this Yearbook, the work we fund takes many different approaches to meeting a wide range of needs. With as many as 400 Open Grants 'live' at any one time, and 11 Special Initiatives under way across the three UK programmes, there is a considerable volume and rich diversity of work and outcomes to map and understand.

At PHF we try to pay particular attention to the types of change that can take a long time to bring about and to doing what we can to ensure that changes are more than short-lived. This means identifying change over quite long periods, which increases the difficulty of knowing whether change can be attributed to any particular activity and source of funding.

Such challenges are familiar to all with an interest in evaluation but they do not lessen the need to understand impact. Following the commitment in our current strategic plan to 'develop a systematic approach to understanding, assessing, monitoring and evaluating the outputs and outcomes of the activities we support', we decided to develop and test a new approach to understanding the impact of the work we fund. This analysis will be particularly important as we look ahead to our next strategic planning period.

Value judgements

Evidence sources

At PHF we have a wealth of information about the outcomes of funded activities, through grantees' reports to us and commissioned evaluations of our Special Initiatives. Our approach involves extracting evidence of change from these reports, coding and then grouping it to develop an 'impact framework' that classifies the outcomes of the work we have funded over the past few years.

There are three levels of change in the framework – change for individuals and communities, change in organisations, and change in policy and practice – each of which contains a number of broad impacts, giving 14 in total. Within each of these, there are several more specific types of change. So, for example, one of our 14 impacts is on marginalised young people, who improve their wellbeing and/or skills for a more successful future. This impact comes from the range of outcomes that our grantees reported to us. The children and young people they worked with:

- Developed skills to support a more successful and happy future, such as resilience and team working
- Improved attendance at school, when at risk of drop out
- Progressed in educational attainment
- (Re-)engaged in education, training, jobs or volunteering
- Improved their speaking and listening skills

And those who had been involved in the criminal justice scheme:

- Reduced their incidence of re-offending

By identifying types of change and grouping them together to form our impact framework, we are able to put together the 'big picture' of the impact of PHF funding. We have trialled this approach with a sample of 40 per cent of completed Open Grants, from our three UK programmes, and can already see impacts that are contributing to our key strategic aims (enabling people to experience and enjoy the arts; developing people's education and learning; and integrating marginalised young people who are at times of transition).

Some of our impact comes through organisations we fund developing new business models, services and partnerships or through training and professional development of staff and volunteers. Grantees' evidence that they become more effective at responding to new needs or different groups helps us to understand more fully our impact on organisations.

We also hope that the work we fund can contribute to wider changes in the practice and policy of other organisations – changes that will have a positive effect on the young and disadvantaged people with whom we are especially concerned. This type of change is particularly difficult to attribute and can take longer to happen. While we see some signs of it happening, we may need to think about further follow-up work to investigate – and perhaps bring about – the sorts of change that evidence shows to be helpful.

Next steps

As we bring together evidence from more grantees' reports and extend the same approach to the evaluation of our Special Initiatives, we will continue to build the picture of the types of impact that PHF-funded work has been able to achieve. As we do so, it is particularly important that we and others are able to learn from the wealth of experience and expertise that has gone into bringing about these changes.

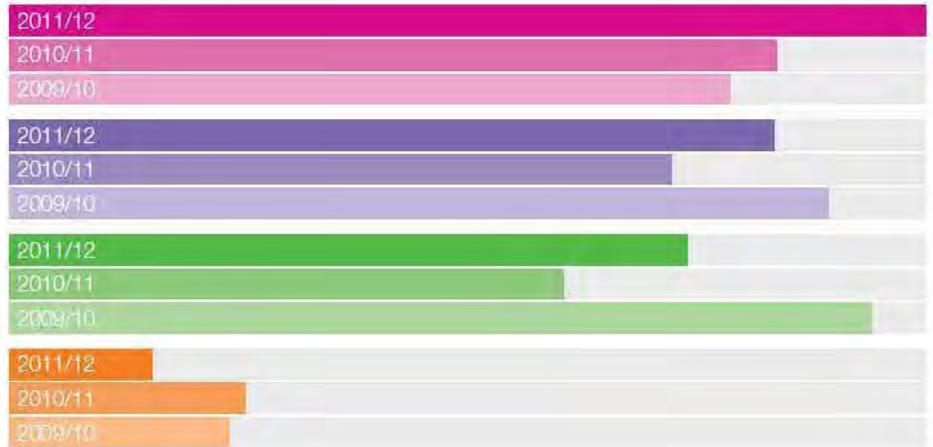
To help us with that objective we have also been assessing the strengths and weaknesses of the outcomes evidence that grantees include in their reports to us. The picture is very varied. Some of the evidence is based on a robust but straightforward approach to monitoring and evaluation, with the analysis clearly presented, helping us to understand the work and its outcomes. This is important to us because we know that organisations that have good information about their own work are better placed to improve their outcomes and to make the case for further funding.

However, not all the evidence was of such a high standard and a small proportion was quite poor. The next phase of our work will include talking to grantees about how we might be able to help them improve it, always recognising that the organisations we fund need a pragmatic approach to evaluation that will provide them with the information they need, while not costing too much in time or money. Already we have revised our reporting guidelines to grantees; we hope that reflecting and reporting on their work will help both PHF and our grantees to learn from the work they are doing.

Analysis of programme awards (excluding other awards)

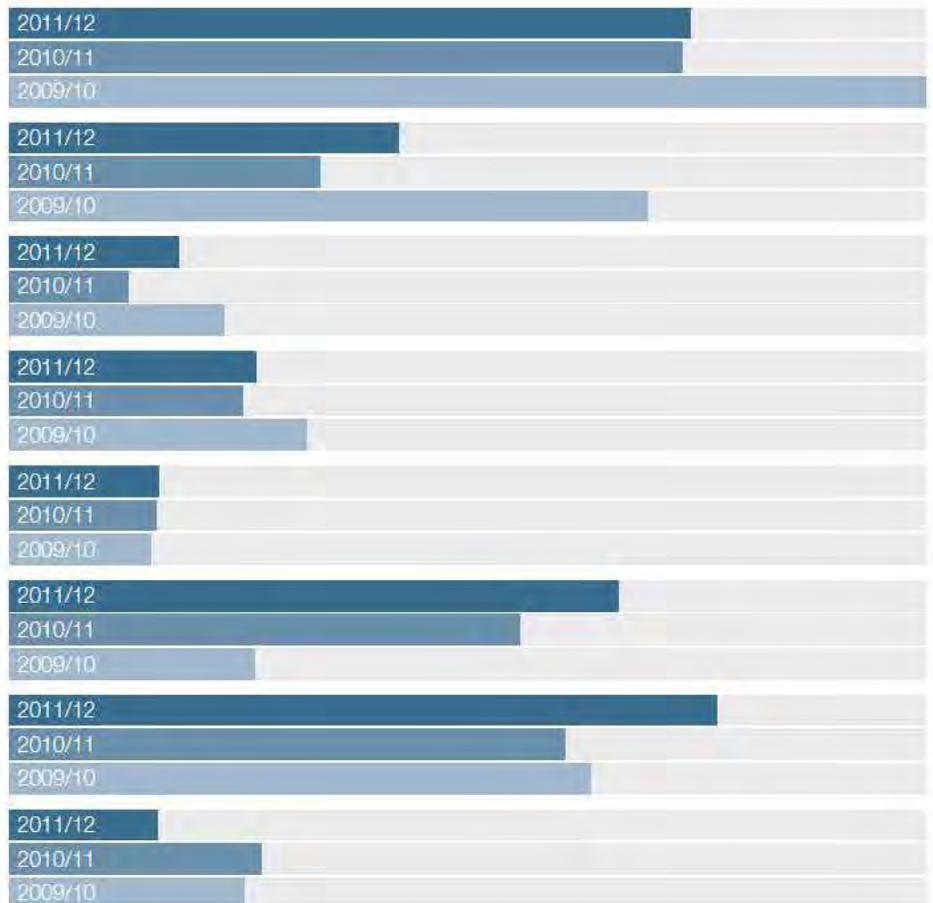
Grant-making summary

	2009/10	2010/11	2011/12
Arts	£4,608,918	£4,957,086	£5,961,024
Education and Learning	£5,330,979	£4,175,442	£4,934,647
Social Justice	£5,651,825	£3,385,260	£4,301,283
India	£931,996	£1,046,232	£354,585
Total	£16,523,718	£13,564,020	£15,551,539



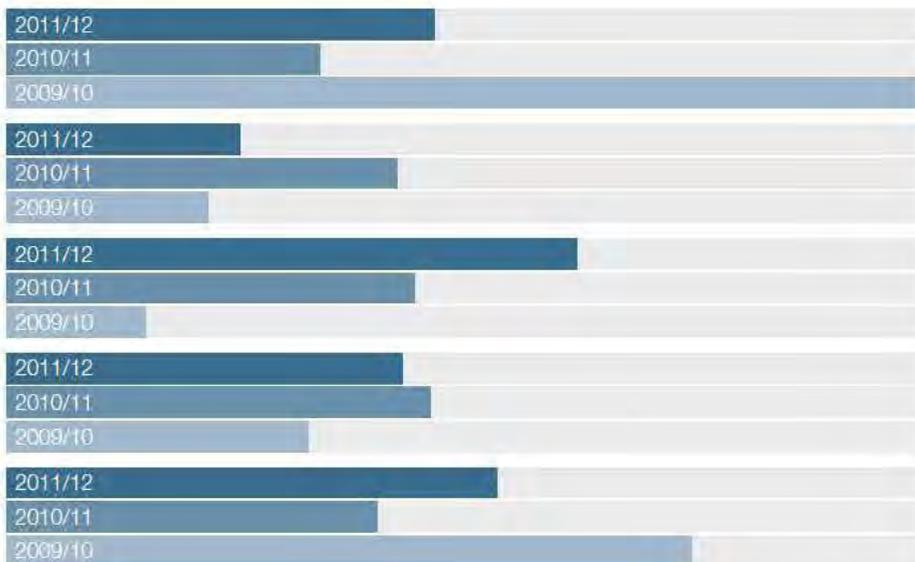
Geographical area served

Area	2009/10	2010/11	2011/12
England (outside London)	£5,297,806	£3,835,052	£3,886,686
London	£3,605,951	£1,433,872	£1,956,519
Northern Ireland	£800,000	£163,712	£501,537
Scotland	£1,343,799	£923,175	£1,012,720
Wales	£314,225	£346,010	£368,600
Multi-regional	£1,005,364	£2,756,544	£3,411,584
UK national	£3,224,577	£3,059,423	£4,059,308
India	£931,996	£1,046,232	£354,585
Total	£16,523,718	£13,564,020	£15,551,539



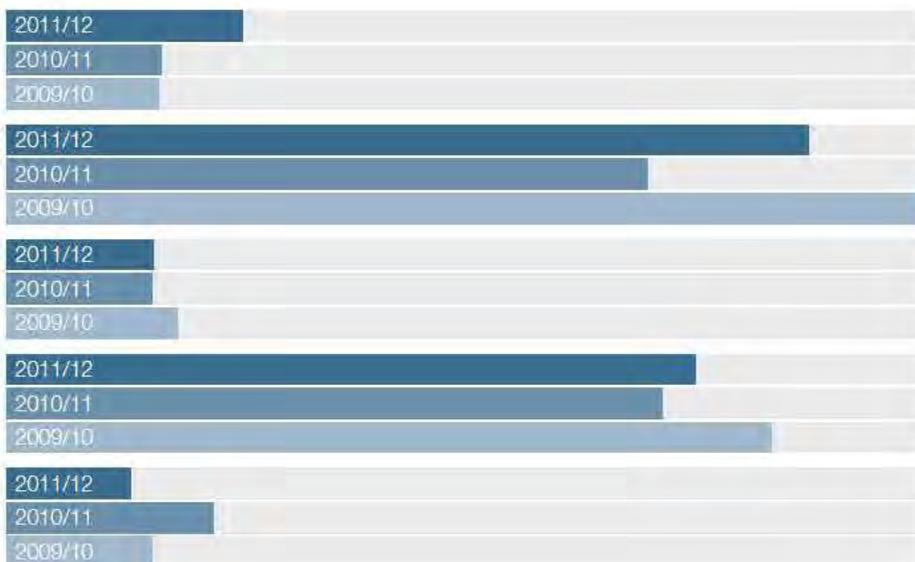
Distribution of funding by focus

Focus	2009/10	2010/11	2011/12
Participation	£7,546,805	£2,070,752	£3,151,187
Professional development	£1,009,445	£2,796,603	£1,314,024
Service improvement	£423,408	£2,963,519	£4,495,389
Social inclusion	£1,955,340	£3,117,998	£2,851,141
Multiple/ other focus	£5,588,720	£2,615,148	£3,739,798
Total	£16,523,718	£13,564,020	£15,551,539



Distribution of funding by age group

Age group	2009/10	2010/11	2011/12
Children (0–11)	£583,146	£613,918	£1,440,451
Young people (12–30)	£7,820,906	£5,564,741	£7,213,727
Adults (31–64)	£776,669	£519,029	£534,876
Multi-age groups	£6,834,232	£5,720,990	£6,059,651
All ages	£508,765	£1,145,342	£302,834
Total	£16,523,718	£13,564,020	£15,551,539



Other grants

Helen Hamlyn Trust

£2,000,000

The Helen Hamlyn Trust is an independent grant-making trust focusing on the initiation of medium- and long-term projects linked to the shared interests of Lady Hamlyn and her late husband Lord Hamlyn. The Trust's core ethos is to develop innovative projects, which aim to effect lasting change, improve quality of life and create opportunities to benefit the public.

The Trust's grant-making is centred on medicine, arts and culture, education and welfare, healthy ageing, international humanitarian affairs, heritage and conservation in India. Small grants are given to local and regional charities up to £10,000.

The Trust establishes lasting relationships with leading organisations and individuals to enable new areas of work to develop. By creating connections between organisations and introducing new ideas, innovation and change can take place.

Open Futures – askit, growit, cookit, filmit (www.openfutures.com) is a schools' curriculum programme that brings 'learning to life' for young children. It champions a fundamental shift in how the National Curriculum is delivered, by re-focusing education on intuitive approaches that ignite children's passion for learning.

A new initiative with the Museum of London, The Ashmolean Museum and Wakefield Museum Service is piloting an approach based on enquiry and the use of digital technology to engage young children with Museum collections. The project (with the working title askit, filmit, shareit in Museums) is being independently evaluated by Hope-Stone Research.

This year, amongst other projects, the Trust has continued its work with and support of the Hamlyn Centre for Robotic Surgery (Imperial College London), the Paul Hamlyn Chair of Surgery (Royal Marsden), the Helen Hamlyn Centre for Design and the Helen Hamlyn Chair of Design (Royal College of Art), research into Optic Nerve Repair and Regeneration to Restore Sight (Moorfields Eye Hospital), the LSO/Panufnik Composition Scheme, the Paul Hamlyn Christmas Family Treat (Royal Opera House), and the Hamlyn-Feilden Fellowship in Conservation Studies (York University).

In India the Trust supports the Restoration and Reuse of Reis Magos Fort, Goa and of Anapurna Bhandar, Jaisalmer, in partnership with INTACH, and Cultural Development at Nagaur Fort, Rajasthan. In New York state, the Trust supports The Vignelli Centre Endowed Professorship at the Rochester Institute of Technology. In Portugal the Trust supports the Setubal Music Festival, a partnership with the Municipality of Setubal, bringing together young people from different ethnic communities through a music development programme.

The Center for International Humanitarian Cooperation

£97,709

This funding is for PHF scholarships in the International Diploma in Humanitarian Assistance, which provides a universally accepted standard of training for humanitarian workers and contributes to our aim to develop the capacity of NGOs.

The Nuffield Foundation

£7,000

The Foundation contributed funds towards the production and publication by the Association of Charitable Foundations of 'The governance and financial management of endowed charitable foundations', by Richard Jenkins. The report was commissioned in partnership with other organisations interested in asset management, including Esmée Fairbairn Foundation, The Joseph Rowntree Charitable Trust, The Nuffield Foundation, Trinity College Cambridge, and Trust for London.

New Philanthropy Capital

£6,000

We contributed funds to support NPC to conduct a survey of a representative sample of charities and social enterprises across the UK, to gauge their capacity for measuring impact.

Other grants awarded in 2011/12:

The Helen Hamlyn Trust	£2,000,000
The Center for International Humanitarian Cooperation	£97,709
The Nuffield Foundation	£7,000
New Philanthropy Capital	£6,000
Exchange rate adjustments	£1,359
Other grants total	£2,112,068

Financial review

Endowment Fund and investment portfolio

The Endowment Fund represents the original gifts by Paul Hamlyn, both in his lifetime and under the terms of his will, together with net gains from related investment assets. The Trustees have discretion to make disbursements from the Endowment fund in circumstances they consider appropriate. Investment returns from the Endowment investment portfolio are used to finance grant-making and other work.

After a recovery in portfolio value over the preceding 12 months we had determined that greater caution was warranted. This stance led the Foundation to make modest gains of £1.97m from a portfolio exhibiting very low levels of risk in both absolute and relative terms. The total size of the fund, including cash held in working capital, was £572m at 31 March 2012.

The Foundation's investment policy is to:

- Maintain in the long run the real purchasing power of the Endowment fund.
- Invest in a diverse range of assets which are most likely to give good total returns in the long term, in order to maximise the total real value of the amounts available for grant-making and other work.
- Manage volatility as far as possible, while accepting that a degree of volatility is concomitant with seeking high returns.

In 2011 trustees accepted the recommendation of the Investment Committee, that after a detailed review, real spending at 3.5–4% pa would be reasonable in the medium term. Ongoing review of this work will be undertaken, particularly if markets prove to be unrewarding over a period of years, although any decision to alter the agreed level of spending would not be taken lightly.

Significant portfolio developments in the past year included:

- We sold all our conventional UK Government bonds. In view of the likelihood of rising interest yields we have maintained our exposure to both UK and global index linked bonds as a hedge against inflation.
- Whilst there were no changes to our listed equity managers, we continued to fund our commitment to private equity, including venture. This includes now partnership with a leading specialist in China as well as some very early stage US managers. Our portfolio, whilst young, is beginning to return cash.
- Last year we moved to increase the orientation of our listed equities to the largest capitalisation companies and in the year under review this was rewarded. In the

developed markets all our managers outperformed their benchmark indices.

- We simplified our property holdings by moving to redeem our real estate fund of funds in the UK. The last of our directly held properties was sold. Our core holding in the sector remains the specialist Charity Property Fund.
- In a mixed year within hedge funds, the Foundation continued to build out its exposure and within sharp variations in actual performance of managers closed the year ahead of our benchmark index overall.
- For some of the year we hedged back some of our US dollar exposures into sterling as we actively manage our currency exposure to a 50/50 sterling/non-sterling neutral position. In September 2011 we bought more US dollars.

When adjusted by the amount spent on grants and costs in the year, the Foundation's Endowment investment portfolio rose by +1.9% for the financial year to 31 March 2012, making an overall advance, over the last three years of approximately +31.4%. At the end of the year the value of the Endowment was in advance of the trustees' target of preserving the real value of its purchasing power. This calculation is made by adjusting Paul Hamlyn's bequests over time for RPI, net of grants.

Expenditure

Grants awarded before adjustments increased by 13% in 2011/12 when compared to 2010/11. The increase is in keeping with the Foundation's strategic plan as Open Grant funding has increased by 8% and spending on several Special Initiatives, initially planned for 10/11, was re-phased to fall in 11/12. Special Initiative expenditure as a percentage of grant expenditure (excluding Helen Hamlyn Trust) increased to 26% of grant spend and Open Grants decreased to 74%.

Support cost expenditure has decreased by £87,000 but this includes an exceptional accounting adjustment for the reduction in provision for dilapidations on the Foundation's previous office premises and provision for rent to the end of the lease. When this is adjusted for, the underlying trend is for an increase in support costs of 2% (£49,000). In March 2011 trustees decided to increase the staffing capacity of the organisation and from September 2011 three additional posts were added to the grant-making teams and one to the support functions. This has resulted in increases in staffing costs (£145,000 approx) and operational support expenditure (£36,000). During 2011/12 the Foundation undertook the refurbishment and fit-out of new premises. The majority of these costs have been capitalised and as the Foundation only moved office in February 2012, the accounts for 2011/12 only show a limited impact on depreciation.

Financial risk

The Foundation's principal material financial risks, including foreign exchange exposures, relate to its investment portfolio and are in line with similar long-term endowment funds in the sector. Overall investment risk management is predicated on running a diversified portfolio of high quality assets across a wide variety of asset classes and markets. The longer term strategic asset mix is set by the Finance and Investment Committee, with input from Cambridge Associates and others. Individual investment mandates are awarded to specialist managers after scrutiny by the Finance and Investment Committee with input from various sources. The Trustees consider the Foundation's risk profile on a regular basis.

Summarised financial statements

Trustees' statement

The summarised financial statements are not the full annual report and financial statements but a summary of information derived from both the Foundation's Statement of Financial Activities and Balance Sheet. The summarised financial statements contain additional information derived from the Directors' report, but that information is not the full text of that report.

The full annual report and financial statements, from which the summarised financial statements are derived, were approved by the trustees on 10 July 2012 and copies have been filed with the Charity Commission and with the Registrar of Companies.

The independent auditors have issued an unqualified report on the full financial statements and on the consistency of the Directors' report with those financial statements. The statement in the independent auditors' report, under section 496 of the Companies Act 2006, was unqualified. The full independent auditors' report contained no statement under sections 498(2)(a) and (b) or 498(3) of the Companies Act 2006.

The full annual report and financial statements are available from www.phf.org.uk or from the Company Secretary.

Tim Bunting

Chairman, Finance and Investment Committee

Independent auditors' statement to the members of Paul Hamlyn Foundation

We have examined the summarised financial statements which comprise the Summary Statement of Financial Activities and Balance Sheet set out on page 55.

Respective responsibilities of directors and auditors

The directors are responsible for preparing the Yearbook 2011/12 in accordance with applicable United Kingdom law and the Statement of Recommended Practice: Accounting and Reporting for Charities (revised 2005).

Our responsibility is to report to you our opinion on the consistency of the summarised financial statements within the Yearbook 2011/12 with the full annual financial statements and the Directors' report and its compliance with the relevant requirements of section 427 of the Companies Act 2006 and the regulations made thereunder.

We also read the other information contained in the Yearbook 2011/12 and consider the implications for our statement if we become aware of any apparent misstatements or material inconsistencies with the summarised financial statements. The other information comprises only the chairman's statement and the other items listed on the contents page.

This statement, including the opinion, has been prepared for and only for the company's members as a body in accordance with section 427 of the Companies Act 2006 and for no other purpose. We do not, in giving this opinion, accept or assume responsibility for any other purpose or to any other person to whom this statement is shown or into whose hands it may come save where expressly agreed by our prior consent in writing.

We conducted our work in accordance with Bulletin 2008/3 issued by the Auditing Practices Board. Our report on the company's full annual financial statements describes the basis of our audit opinion on those financial statements and the Directors' report.

Opinion

In our opinion the summarised financial statements are consistent with the full annual financial statements and the Directors' report of Paul Hamlyn Foundation for the year ended 31 March 2012 and comply with the applicable requirements of section 428 of the Companies Act 2006, and the regulations made thereunder.

PricewaterhouseCoopers LLP
Chartered Accountants and Statutory Auditors
London
10 July 2012

Summary financial statements

Summary Statement of Financial Activities for the year ended 31 March 2012

	2012 Total £m	2011 Total £m
Incoming resources from generated funds		
Legacy income	–	5.709
Other income	0.103	–
Investment income	13.899	13.798
Grants receivable	0.254	0.265
Total incoming resources	14.256	19.772
Resources expended		
Investment management	4.293	3.812
Charitable activities including grant-making	19.027	17.684
Governance	0.034	0.046
Total resources expended	23.354	21.542
Net (outgoing) resources and net income for the year	(9.098)	(1.770)
Other recognised gains and losses		
Realised and unrealised gains on fixed asset investments	1.973	20.130
Net movement in funds	(7.125)	18.360
Funds at 1 April 2011	566.685	548.326
Funds at 31 March 2012	559.560	566.686

The Statement of Financial Activities includes the Income and Expenditure Account and the Statement of Total Recognised Gains and Losses

Balance Sheet at 31 March 2012

	2012 Total £m	2011 Total £m
Fixed assets		
Tangible assets	6.158	4.721
Investment assets	565.852	564.783
	572.010	569.504
Current assets		
Debtors	0.498	1.178
Other investments	6.240	10.026
Cash at bank and in hand	0.048	5.526
	6.786	16.730
Creditors falling due within one year	(12.381)	(12.461)
Net current assets	(5.595)	4.269
Total assets less current liabilities	566.415	573.773
Creditors falling due after more than one year	(6.855)	(7.087)
Net assets	559.560	566.686
Funds at 31 March 2012	559.560	566.686

Represented by:		
Unrestricted Funds	–	2.639
Restricted Funds	0.196	0.065
Endowment Funds	559.364	563.982
Total Funds	559.560	566.686



Realising people's
potential for 25 years

Paul Hamlyn Foundation 25th anniversary

2012/13 marks 25 years since the Foundation was established in 1987. We will be marking this occasion with a series of gifts to be announced later in 2012. To keep up to date with the Foundation's activities please sign up for our quarterly newsletter (via www.phf.org.uk) or follow us on Twitter: @phf_uk



Please give your feedback on our Yearbook

We hope you have found this Yearbook useful and enjoyable to read. To help us to improve how we report on our work, please complete a brief feedback form on our website.

The Foundation's new King's Cross offices

Flexible meeting facilities at PHF's new King's Cross offices, available for use by charities. See our website for details: www.phf.org.uk/grantsplus

Trustees, staff and advisors

Trustees

Jane Hamlyn (Chair)
Tim Bunting
Estelle Morris
Claus Moser
Tony Hall
Michael Hamlyn
James Lingwood
Anthony Salz
Peter Wilson Smith
Tom Wylie

Staff

Ushi Bagga	Grants Officer, Arts
Denise Barrows	Head of Education and Learning
Rob Bell	Head of Social Justice
Susan Blishen	Right Here Manager
Liz Cadogan	Grants Officer, Social Justice
Régis Cochefert	Head of Arts
Tony Davey	Information and Resources Officer
Sarah Jane Dooley	Grants Officer, Arts
Susan D'Sylva	Finance Officer
Robert Duffon	Director
Susie Dye	Grants Officer, Social Justice
Maria Ferron	Chair and Director's Assistant
Noelle Gilbert	Grants Officer, Education and Learning
Gillian Goode	Grants Assistant, Arts
Rosie Gray	Communications Intern (September–December 2011)
Dorothee Irving	Grants Officer, Arts
Fatima Joaquim	Housekeeper (to December 2011)
Safiya Juma	Special Initiatives Administrator, Education and Learning
Maria Karska	Administration Officer
Abigail Knipe	Grants Officer, Education and Learning
Katie Lloyd	Communications Intern (from May 2012)
Nora Loewenberg	Grants Assistant, Education and Learning
Angela Melis	Catering Coordinator
Marcello Moro	Finance and Resources Assistant
Lucy Palfreyman	Finance and Resources Director, Company Secretary
Kay Patel	HR and Administration Assistant
Richard Robinson	Investment Director
Kristofer Rollo	Communications Intern (January–May 2012)
Sachin Sachdeva	Director, India
Liz Scott	Accounts and IT Officer
Samantha Smallcombe	Grants Assistant, Social Justice
Jane Steele	Head of Impact and Evaluation
Paul Strauss	Research Analyst
Dan Watson	Communications Manager
Faye Williams	Right Here Coordinator
Skalzang Youdon	Administrator, India

Advisors

Bridgette Anderson	Social Justice
Dr Robert Berkeley	Social Justice
Sir Tim Brighthouse	Education and Learning
Kate Brindley	Arts
Lord Gavron	Investments
Simon Gillis	Investments
Roger Graef	Social Justice
Sushma Iyengar	India
Jennifer Izeckor	Education and Learning
Maureen McGinn	Social Justice
John McGrath	Arts
Dr Donald Peck	India
Jonathan Reekie	Arts
Shankar Venkateswaran	India
Claire Whitaker	Arts
Vanessa Wiseman	Education and Learning
Dr Paul Woolley	Investments

Independent Auditors

PricewaterhouseCoopers LLP, 7 More London Riverside, London SE1 2RT

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Other images in sequence:

p.12 Tommy Ga-Ken Wan; p.14 (top) Magnus Andersson; p.14 (middle) Marc Marnie; p.14 (bottom) Stewart Hemley; p.27 (top) Steve Bootle; p.27 (middle) Bedlingtonshire Community High School; p.27 (bottom) Talk Together London CIC; p.38 (top) Changing Tunes; p.38 (middle) The Reader Organisation; p.38 (bottom) Len Grant; p.45 (all images) Sachin Sachdeva; p.56 (Leeke St images) Matt Clayton.

