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**YORKSHIRE FUNDERS 2022 CONFERENCE**

**Smarter Giving in the New Normal**

**15th June 9.30am – 4.00pm**

**St. Saviourgate, York**

**Headlines from Morning Plenary Session**

***Paul Streets OBE, CEO – Lloyds Bank Foundation***

Learnings from Covid:

* Small, frontline groups responded brilliantly, generally reacting and adapting more quickly than very large charities.
* Many funders made getting funding from them faster and easier than ever before – important to keep this going and not to go back to the way things were before Covid.
* People living with sexual abuse and learning disabilities were some of the groups hit hardest, along with young people. And don’t forget the importance of Black Lives Matter.
* The Foundation set a target of funding 25% of all organisations funded being BAME-led groups.
* Always important to fund capacity building and support charities and groups in this way.

Going forward/trends:

* The cost-of-living crisis will not be going away any time soon.
* Looking after refugees is key and not putting them into ‘good refugee’ and ‘bad refugee’ categories.
* Climate change must be tackled.
* Staff morale, recruitment and retention at frontline charities and voluntary groups is a growing issue.
* Give more unrestricted funding.
* Frontline charities and groups should be accountable to their communities and not funders.
* Bring in more people with ‘lived experience’ on to your board. Best to appoint two or more trustees with ‘lived experience’ at the same time so they don’t feel alienated or like they don’t belong.
* Getting beyond grants – fund systems change work.
* Focus on what you do best and don’t try and support everyone and everything.
* Provide support and encourage charitable groups to work more closely together.
* Influence more. This needn’t be political and all about ‘placards’ but can be more subtle such as trustees talking to colleagues/peers on the golf course and discussing issues.
* Lloyds Bank Foundation will announce its new five year strategy in October and it is likely that there will be a focus on charities in the £200-500K income range who work with people dealing with a range of complex social issues.

Resources/reading material:

* <https://reachvolunteering.org.uk/trustee-recruitment-cycle?return=r> – read this national charity’s Trustee Recruitment Cycle for tips and guidance on how to recruit trustees and diversify your board.
* <https://www.lloydsbankfoundation.org.uk/we-influence/the-value-of-small-in-a-big-crisis> -

read the Foundation’s 2018 research with Sheffield Hallam University which found small and medium-sized charities – those with an annual income between £10,000 and £1 million –

were a vital and distinctive component of the social and economic fabric of communities across England and Wales.

***Danielle Walker Palmour, Director – Friends Provident Foundation***

* Increased transparency and accountability should be at the top of every funders’ priority list.
* Read <https://www.foundationpracticerating.org.uk/> for Friends Provident’s important initiative which rated 100 UK grant-making foundations on their diversity, accountability & transparency.
* Get a website! And ensure that it’s clear.
* Have multiple ways to contact you, e.g., British Sign Language, text relay, email and telephone.
* Disclose diversity of your staff (if >50 staff members) and disclose diversity of your board (if >10 trustees)
* Have & disclose a plan for improving (maintaining?) diversity, including targets.
* Do things yourself that you ask others to do.
* Encourage openness in your organisation.

**Local Funders Panel – Learnings from Covid & top tips for being a smarter funder**

***Kath Lindley, CEO of Wakefield & District Health & Community Support (WDHCS)***

Learnings from Covid

* Recruited more staff – need to build your own capacity and invest in yourself in order to create a more diverse skills base.
* Importance of working more closely with other funders and carrying out research in order to have a better understanding of your funding area, it’s people and the issues they’re facing.

Going forward & top tips

* Rocket Science research with WDHCS has given the funder and its partners a greater insight into the needs for the District – read the findings here <https://whats-up-wakefield-district.carrd.co/>
* Inform, invest, and collaborate – work in a systemic way.
* Listen, build relationships, visit applicants, be open to new ideas, be brave and look at the possible, not the impossible.
* Ensure your own internal communications channels are robust.

***Shahed Molvi, Head of Grants at Leeds Community Foundation***

Learnings from Covid

* Worked more flexibly and were more accommodating to grant seekers.
* Pre-Covid only funded projects and in 2020 started doing more core and unrestricted funding for organisations. Also, multi-year grants and gave funds to build resilience.
* Became more of a relational funder and worked to share the power and involved people with ‘lived experience’ more in our decision-making. LGBTQ, those with learning disabilities and BAME communities were underrepresented before.

Going forward & top tips

* To be a modern grant maker you should constantly be looking at your processes and systems.
* As a relational funder who is looking to share the power we now run pre-application workshops, want to save applicants time and are always thinking, how can we make it easier for grant seekers? The Yorkshire Common Application Form (YCAF) is a way of doing this.
* We’re continuing to provide more core, unrestricted and multi-year grants.
* Put DEI at the forefront of your mind.

***Rachel Payling, Head of Stronger Communities at Barnsley Metropolitan District Council***

* Gave £2m to the Barnsley VCSE sector during Covid, mobilised 11,000 volunteers and supported 794 community and voluntary groups.
* During Covid encouraged more collaboration and connectivity.
* Going forward – keep it simple, include the people and hear them.
* Communication is key – it must be a two-way street.
* Keep the good bits from Covid, like hybrid working – sometimes virtual, other times in person.

***Morven Whyte, Vice-Chair of Trustees, Sir George Martin Trust***

* Important to move with the times and move faster.
* Take the time to plan and learn from your mistakes.
* Get the right trustees, think more about resilience and punch above your weight.
* Work backwards and first think, what do we want to achieve?
* And lastly, be kind to applicants and each other.
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