



# OPEN & TRUSTING

with **IVAR**



*Everything you need to know  
about the movement for flexible  
funding – and how to be part of it*





***Vision:* A powerful and independent voluntary sector, meeting social need and galvanising change.**

Everything we do is to help strengthen communities across the UK through action research, education and training.



# What is Open and Trusting?

The image features a dark teal background. In the upper left, there is a light green rounded rectangle. The title 'What is Open and Trusting?' is written in a dark teal, sans-serif font within this rectangle. A thick teal line starts from the right edge of the green rectangle, curves downwards and to the left, then turns right to run horizontally across the bottom of the frame.



*Open and Trusting is built on a simple but powerful idea: that relationships between funders and charities can – and must – be grounded in trust, not transaction. It's this that will make the biggest difference to charities, communities and people.*

Kamna Muralidharan, Chair of Trustees, IVAR

# What is Open and Trusting?

- A community of 170+ funders, worth over £1 billion in funding
- Committed to more flexible and collaborative grant-making
- Informed by what matters to charities



Foundation



Cronfa Gymunedol Fferm Wynt  
**PEN Y CYMOEDD**





*Open and Trusting was born from two forces: 25 years of deep listening to both charities and funders, and a crisis that couldn't be ignored.*



# What matters most to charities?





# The eight commitments

1

Don't waste time

2

Ask relevant questions

3

Accept risk

4

Act with urgency

OPEN &  
TRUSTING  
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5

Be open

6

Enable flexibility

7

Communicate with  
purpose

8

Be proportionate

# The eight commitments

1

## Don't waste time

**For example:** **The Architectural Heritage Fund** encourages potential applicants to contact them to ascertain their eligibility before completing an application. **Comic Relief** holds Q&A sessions to allow prospective applicants to ask any queries they might have.

2

## Ask relevant questions

**For example:** **National Emergencies Trust** only asks for information that cannot be sourced publicly. **Texel Foundation** sends shortlisted candidates a list of points for discussion, inviting them to participate in a call with their programme director and trustees.

# The eight commitments

3

## Accept risk

**For example:** **Wembley National Stadium Trust** is willing to “take a punt” if the work meets basic criteria and is of benefit to the local community, working to address any weaknesses rather than reject out of hand. **Point North** seeks to support those whose financial position might ordinarily put them outside of consideration.

4

## Act with urgency

**For example:** **Mercers’ Company** accelerates decisions in some programme areas with rolling applications and reviews expressions of interest every four weeks. **Paul Hamlyn Foundation** brings in additional resource if necessary to meet published decision time.

# The eight commitments

5

## Be open

**For example:** **BGF Foundation** provides information on what successful organisations demonstrated to help future applicants understand what they're looking for. **Co-op Foundation** co-creates their vision and strategy with communities. 64% of Open and Trusting funders share details of their grant making data on 360 Giving.

6

## Enable flexibility

**For example:** **National Benevolent Charity** favours unrestricted or core cost funding, even if an organisation has applied for project funding. **Forever Manchester** is trialing some multi year funding to give groups more security and flexibility in how they work.

# The eight commitments

7

## Communicate with purpose

**For example:** **Lloyds Bank Foundation** runs welcome and induction sessions for new and returning partners, and holds regular check-ins. When a grant is coming to an end, **Pears Foundation** gives as much notice as possible and bridging support where appropriate, so that the organisations can plan for the future.

8

## Be proportionate

**For example:** **Bradford Producing Hub** holds and records evaluation meetings at the end of its larger grants, to reduce the amount of writing the grantee needs to do, and to ensure its capturing what it needs to know. Wherever possible, **Corra Foundation** accepts reports produced for other funders

# What it involves



**Adopt the eight commitments** to Open and Trusting Grant-making



**Share what they are doing** to put them into practice



**Be part of a community of practice** with other funders to help us all adapt and improve



**Be held to account** within the Open and Trusting community through a collaborative review, involving charities

# The spirit of Open and Trusting



Each funder faces different constraints and different opportunities



There is no single way to be open and trusting



There are multiple entry points to being open and trusting



Everyone can go further



# Shaped by charities

- Charities are part of reviewing commitments every other year
- Our charity panel keeps Open and Trusting grounded in real experience



## Accountability

*"[O&T accountability is] the best conversation I have seen happening, between people who give money and people who take it."*

*- Charity leader in IVAR's charity panel*



*Being involved in Open and Trusting has turned into the most empowering, invigorating, active process — and I've loved every minute of it.*

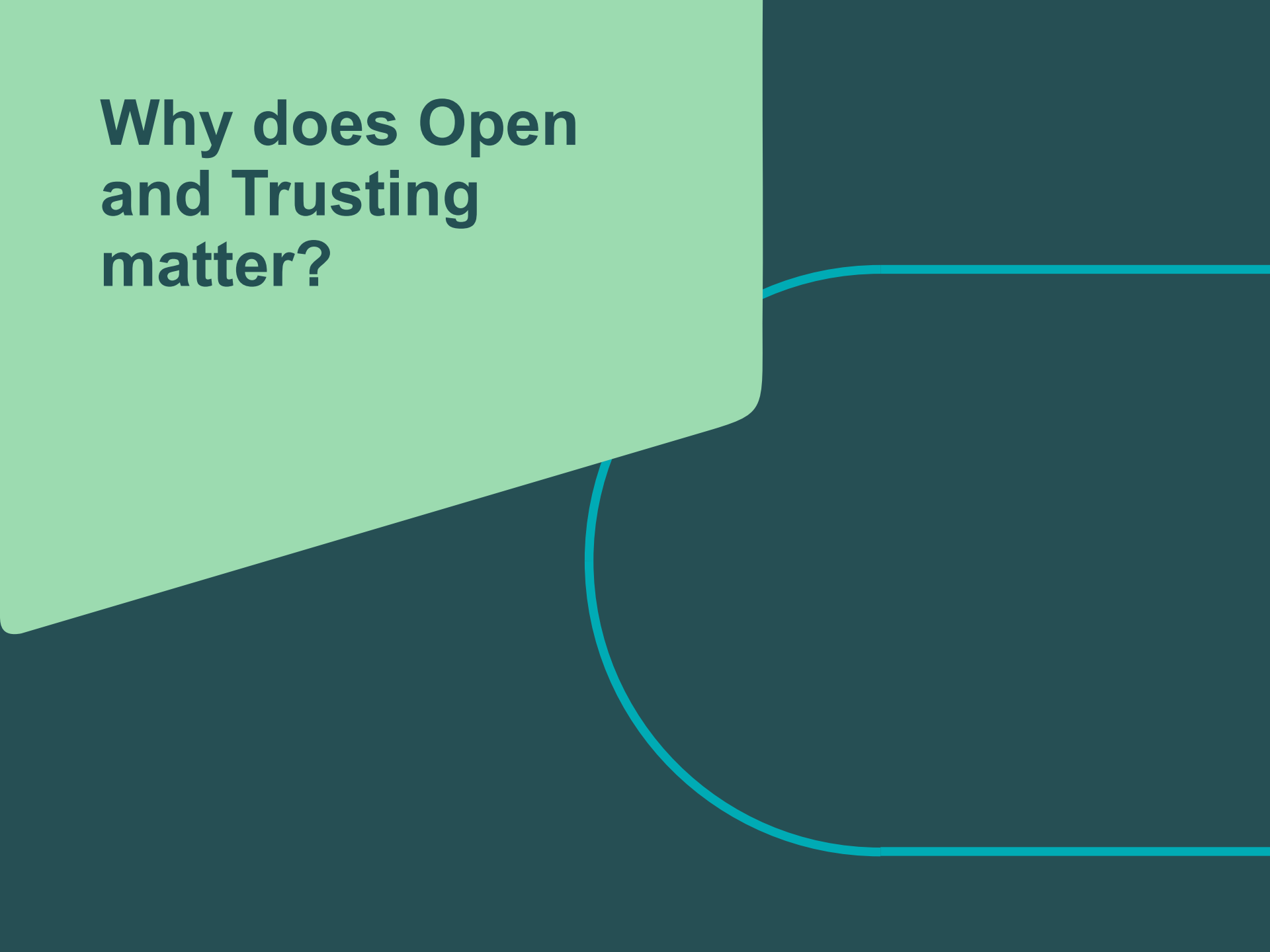
Laura Atyeo, Open Harmony CIC  
(Open and Trusting charity panellist)



*Open and Trusting should be how we all work - it's incredible that it's not. Making it the gold standard across the sector is what excites me.*

Abby Guilding, WellChild  
(Open and Trusting charity panellist)

**Why does Open  
and Trusting  
matter?**

The background consists of two main color fields: a light green area in the upper left and a teal area in the lower right. A thick, curved line separates the two colors, starting from the bottom left and curving towards the top right. The text is positioned in the light green area.

# Why does Open and Trusting matter?

Charities say that open and trusting grant-making enables them to:

1

Be more responsive to their beneficiaries' priorities.



2

Be more agile in the light of changing needs.



3

Focus more energy on mission and outcomes.



4

Learn and share openly.



5

Plan more confidently.



# The mutual benefits of Open and Trusting



**Saves time** through clearer processes and less bureaucracy



**Builds stronger relationships** based on trust and transparency



**Creates alignment** between what charities need and what funders offer



**Improves impact** by freeing charities to do what they know works





*The Open and Trusting community is one of the few places I've found where change is being pursued seriously and collectively. It's grounded in real commitments: listening more, simplifying processes, accepting risk, and centring relationships.*

André Clarke, Director of Charity Development, Lloyds Bank Foundation



*It's inspiring to be around like-minded people who want to do things differently — to be better funders and genuine partners. Open and Trusting helps us challenge hierarchies, back up ideas with evidence, and be better.*

Katy Beechey, Texel Foundation  
(Open and Trusting funder)

**What does Open  
and Trusting  
offer?**

The image features a dark teal background. A light green rounded rectangle is positioned in the upper left corner, containing the text 'What does Open and Trusting offer?'. A thick teal line curves from the right edge of the green rectangle, extending horizontally across the top right, then curving downwards and then horizontally again at the bottom right.

# Why join us



**Connect with a community of funders and charities**



**Develop your own best practice**



**Access the latest research, resources and tools**



**Take part in bespoke sessions with trustees and staff**

# Further reading

## Reports

- [Making the case for unrestricted funding](#)
- [Time to end the dominance of short-term grants: the case for multi-year funding](#)
- [Accepting risk in funder practice](#)
- [Act with urgency: how open and trusting funding benefits funders and charities alike](#)
- [Let charities shine: six principles for open and trusting applications and assessments](#)

## Stories

- [“It was a knock on the door that needed answering” – why we moved to multi-year grants](#)
- [From charity advocate to funder convert: The case for flexible funding](#)
- [Bank of Scotland Foundation: Our journey to unrestricted funding](#)
- [Under the bonnet of unrestricted with The Bromley Trust](#)

# What's next?

Vibrant movement and  
community

Accountability every day

Communities of practice

Adapting to changing context

Going further on every  
commitment

**Join us:**

[www.ivar.org.uk/  
become-open-  
and-trusting](http://www.ivar.org.uk/become-open-and-trusting)

**Any questions?**

[keeva@ivar.org.uk](mailto:keeva@ivar.org.uk)



*It's not about perfection - every funder's path is different. But we can all go further. That's what Open and Trusting makes possible.*

Orla Black, Community  
Foundation Northern Ireland





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