

Annual Review

2015/16



CALOUSTE GULBENKIAN
FOUNDATION

UK BRANCH



Our purpose

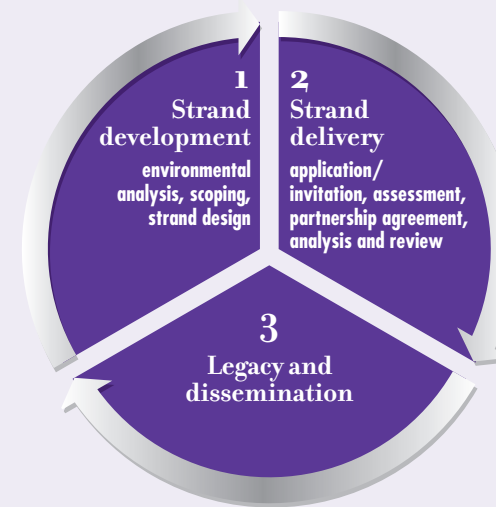
The UK Branch of the Calouste Gulbenkian Foundation aspires to bring about long-term improvements in wellbeing, particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) which deliver social, cultural and environmental value.

Our strategy

We are currently implementing our 2014–19 strategy, which builds on previous work. Three strands – Transitions in Later Life, Sharing the Stage and Valuing the Ocean – are supported by Creating the Conditions for Change, cross-cutting work aimed at promoting collaboration and social innovation. We also seek to secure the legacy of programmes that have reached, or are about to reach, their conclusion. We will conduct a mid-term review of our activities in 2016.

How we work

In carrying forward this strategy we are working in a new way that is consultative and collaborative, developing and delivering each strand through a systematic cycle of activities.



A key component of our approach is support for the development of networks and other collaborations. Each strand supports a ‘learning community’ in which our partners come together to exchange learning and advance their field of practice.

Evaluation, reporting and learning are embedded in each stage of the programme cycle from early research and scoping to legacy and dissemination. Evaluation frameworks designed in collaboration with our partners will enable us to assess outcomes, capture learning and to feed this into future planning.

We recognise the importance of effective communications. We develop influencing plans for each strand. The objective is to bring our work to the attention of other potential funders and disseminate the learning to those who can act on it to make a positive difference.

We plan for legacy early in the life of our strands of work by, for example, helping partners to develop their case for support and seeking to interest other funders in our work.

SUMMARISING OUR APPROACH

Explore

We will support research which inspires new thinking and provides evidence to inform changes that will lead to increases in wellbeing.

Experiment

We will support selected pilot interventions and occasional start-up organisations.

Exchange

We will act as a convenor and collaborator, bringing people together and fostering partnerships that might not otherwise happen, supporting and engaging in networks and hosting learning communities.

Explain

We will seek to understand what happened and to disseminate the learning to those who can act on it.

Exit

We will seek to create a legacy so we can move on and address other issues.



Contact Theatre and partners pilot an initiative for Sharing the Stage that will bring together young participants from an underserved area of North Manchester to create a spectacular production combining aerial performance and digital arts. *Escape 2015*, photo: Junior Akinola.

“Collaboration is the bedrock of our approach – greater impact can be achieved by harnessing the distinctive contribution of others.”

Andrew Barnett

UK Branch Director's Report

This year marks the sixtieth anniversary of the Foundation. As we look back over the past six decades, we can see that a significant characteristic of our organisation is that we have sought to be bold and ahead of the curve. Our personality as an organisation identifies us as strongly as our actions, so when we developed our new five-year strategy in 2014 we knew that we wanted to be defined as much by how we worked as by what we did.

The Foundation reflects the character and concerns of our founder, Calouste Gulbenkian: he was more a business architect than entrepreneur, relentless, persistent and a forger of international consortia. His family origins made him the man he was: multilingual, multicultural, and an important figure in international business diplomacy. Beyond philanthropy, his personal interests, including his fabulous art collection, suggest a deep feeling for history. He also had an enthusiasm for nature, particularly horticulture.

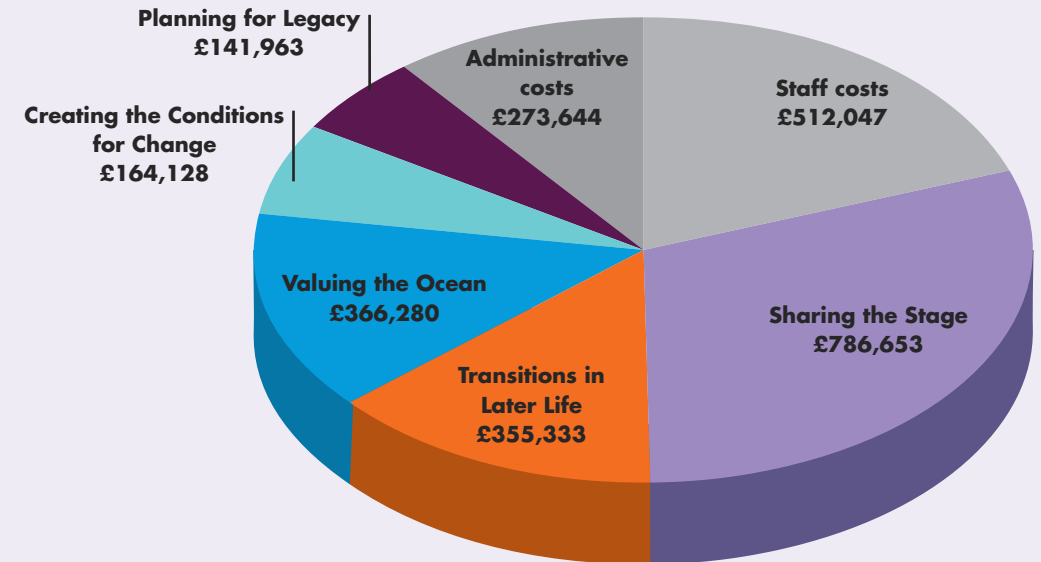
Our strategy, our work and ways of working demonstrate the characteristics by which we would wish to be known. We aim to develop our strands of work based on sound scoping research and extensive consultation. We endeavour to be a partner rather than a funder. Our offer is more than just money as we try to help the organisations we work with overcome challenges, develop their networks, and achieve greater recognition and influence. We want to create a legacy from our programmes through evaluation and learning and by showcasing the activities we support to other funders. And we learn from international exchange, working closely with colleagues in Portugal and drawing on international expertise as we develop new initiatives.

This annual review provides some specific examples of how we have demonstrated these characteristics in the UK. Each of our strands has emerged from previous work and where possible is aligned with the Foundation's programmes in Lisbon. For example, Valuing the Ocean extends the remit of the Gulbenkian Oceans Initiative. And as an international organisation we drew inspiration from beyond the UK for our participatory performing arts work, including Sharing the Stage.

Three distinct themes have come to the fore in our work during 2015. The first is the value of 'communities of learning'. One of the things I have observed in our initiatives – from marine conservation to the arts – is that small organisations are doing lots of interesting things but massive fragmentation persists and experience is often not shared. We are therefore supporting learning communities across each of our strands. The most developed example is the Marine CoLABoration, a group of nine environmental NGOs working together to improve the way we communicate the value of the ocean.

The second theme is early intervention. For example, our Transitions in Later Life strand seeks to help people in midlife consider their emotional as well as financial wellbeing in preparation for retirement, so that they have the tools and support they need to cope with the difficult transitions that older age inevitably brings.

Financial Summary UK Branch 2015



In 2015, additional resources were allocated to Sharing the Stage – the furthest developed of our strands of work – to enable new participatory performing arts models to be scaled to full production.

The third theme relates to our partnerships with others. We tend to work with expert individuals and organisations towards common goals. Strong partnerships support each of our strands, and the principle of acting collaboratively underpins our work. We have, for example, supported research to encourage greater collaboration between funders. This research examining the funding ecology is part of a set of initiatives called Creating the Conditions for Change, which aims to create an enabling environment within which the organisations we support can flourish.

We are more confident than ever that we will be able to contribute to the changes we seek as we deliver our plans in 2016 and beyond. Over sixty years, despite a limited financial reach in the UK, we have worked with others to achieve successful outcomes in a diversity of fields. We can look back and learn from all that has gone well, and not so well, in planning for the decades to come.

Andrew Barnett

Transitions in Later Life

To increase knowledge of transitions in later life and to secure more appropriate responses for people as they age...

The fact that people are living longer is something to be celebrated. However, our later years are likely to present negative challenges as well as positive opportunities. These challenges may include bereavement and the loss of both family and friends, ill-health and/or a loss of mobility and other changes likely to impact negatively on our emotional health. The Foundation's earlier work on ageing, including notably on loneliness in later life, built on our ambition to strengthen social connections in later life. It highlighted the importance of early preparation for significant changes, such as retirement, to ensure that people have better experiences as they age.

"It sounds nice to retire, but it's frightening as well."
Focus group participant

Strand development and achievements

Our scoping research indicated that little work was being done to prepare people pre-retirement for the transitions they were likely to experience in later life. Those initiatives that had been trialled tended to be small scale, time limited and almost exclusively focused on financial planning. We are testing the potential

benefits of interventions pre-retirement and aspire to build an evidence base informed by evaluation data and the experience of a cohort of projects. Our objective is to test new models that have the potential to grow and operate at scale. Our focus on early preparation for later life transitions is complemented by our support of the Campaign to End Loneliness.

Support summary: £355,333

Sitting Comfortably: perceptions of older people in society and the arts are challenged in a collaborative pilot project created by Geraldine Pilgrim Performance Company for Sharing the Stage. Photo: Sheila Burnett.



Two hundred people participated in Retirement Transitions Initiative workshops trialled by the Shaftesbury Partnership in Wigan, Coventry and Southampton.



Above: 'The Age of No Retirement?', a collaborative movement that aims to create a society without age barriers, shared lessons and co-designed prototypes for the future at its Manchester 2015 event.

Highlights

- Selection of a cohort of projects to test seven pre-retirement initiatives for building emotional resilience and wellbeing was informed by research mapping existing projects. We have commissioned the Innovation Unit to develop a 'prototype' or model service or product based on research with potential consumers and input and learning from the cohort of projects.
- The Shaftesbury Partnership successfully piloted its Retirement Transition Initiative (RTI) across three cities to develop participants' social connections and resilience before retirement through community-led workshops. We are collaborating with Jaguar Land Rover to support a national rollout.
- Our work and recommendations have helped inform the Big Lottery Fund's development of 'Accelerating Ideas: An Ageing Society', a programme designed to share ideas and best practice across the UK. Through this, The Age of No Retirement, which we co-sponsored, is scaling up its activities.

- Our strategic partner the Campaign to End Loneliness begins its sixth year with a large and active network supporting its aim to tackle the significant health impacts of loneliness in later life. It has influenced around 80 per cent of local authorities to take action through practical guidance based on rigorous evidence. Endorsed by Public Health England the Campaign, which works with government, local government and a range of national and local stakeholders, generates significant media coverage. After a strategic review in 2015 it has a robust fundraising plan for growth and future sustainability.
- We supported Social Finance to develop a Social Impact Bond to tackle isolation and loneliness. The first bond, 'Reconnections', is being piloted by Worcestershire County Council and Age UK Herefordshire and Worcestershire with a consortium of commissioning and delivery organisations.

What have we learnt?

- Strong relationships with funding partners are essential to achieving impact across all our strands. Built over the long term, they require time and capacity.

What next?

- We will further develop provision for people in midlife which enables them to cope with transitions in later life, bringing together a learning community of practitioners and experts, and encouraging employers to take up ideas tested through the strand.



An established media profile enables the Campaign to End Loneliness to communicate the health risks of loneliness and promote practical solutions.

Sharing the Stage

To identify and support models of best practice and originality in the area of participatory/socially engaged performing arts...

Evidence shows that the participation of non-professionals in high quality performing arts improves their wellbeing, and is beneficial to vulnerable people – providing new skills, richer social networks and greater confidence to engage with society. Groundbreaking work demonstrates the social and artistic value of participation, despite some scepticism and a lack of financial backing. In a fragmented field, our aim is to help support positive change in

“The arts are vital because they restore dignity.”

Matt Peacock, With One Voice Brazil project

the practice of arts organisations and in the arts funding system by building on good practice, increasing capacity and encouraging new collaborations.

Strand development and achievements

This strategic priority has been informed by learning from our support over a number of years for participatory performing arts projects through a significant annual award. The strand was also informed by a period of research and consultation. On the basis of an open call for applications we selected fourteen collaborative projects involving a range of partners from the arts and social sectors. These projects were selected on the basis that they were likely to make a significant contribution to participatory performing arts practice. In addition, we are supporting a small number of longer term strategic partnerships. We bring together the projects we are supporting in a learning community which shares its experience.

Support summary: £786,653



Sharing the Stage initiatives. Graeae Theatre Company's training of disabled veterans, including circus fitness, will build towards a high-profile performance in 2018. Photo: Alison Baskerville. Right: Artangel's project to improve the wellbeing of isolated older men moved from cookery workshops to a performed installation.

The Uplifters project – part of LIFT's engagement in Tottenham – will introduce a diverse group of students to the arts, enabling them over a 5-year period to create their own participatory experiences and build relationships with the local community. Photo: Alex Hyndman.



Above: *Life Is*, one of 30 performances held in people's homes across London depicting stories inspired by their lives, part of Theatre Royal Stratford East's Home Theatre (UK) project. Photo: Phil Clarke-Hill.

Highlights

- The fourteen consortia worked with us to develop the strand's theory of change and evaluation framework. The Esmée Fairbairn Foundation has partnered us in this work, enabling us to support ten projects to production in 2016.
- London International Festival Theatre (LIFT) has begun its ambitious programme of participatory performing arts activity in the deprived area of Tottenham. Over six years, LIFT will bring together world-class artists and local people to create high quality performance and improve the life chances of young people living in the area.
- Home Theatre, a revolutionary concept developed to explore the stories of Rio's poor through performances in their own homes, is evolving into an international movement. We backed Theatre Royal Stratford East to pilot this uniquely personal way of tackling social issues through thirty home performances and a peer-to-peer shared learning symposium in London.

- Streetwise Opera is developing the first international network of organisations working in the field of arts and homelessness. Its With One Voice project will support exchanges, initially between the UK and Brazil, where creativity is well understood as an agent for social change. Further exchanges are planned with Brazil and Tokyo.
- Two inspiring projects that are respectively helping disadvantaged young people and rough sleepers to create their own positive change, the Agency and Duckie's The Slaughterhouse Club, both piloted with our support, are being funded to scale up their work by the Big Lottery Fund.

What have we learnt?

- While collaboration and sharing has to develop naturally and cannot be forced, it is helpful to provide structures and support which facilitate it. Curating connections between people and organisations is at the heart of our work.

What next?

- We will support the development of the Sharing the Stage learning community, engaging the wider sector through events focusing on key issues in practice, and we will work with colleagues in Lisbon to increase the strand's international reach.



The first With One Voice Brazil-UK exchange was held at the Booth Centre for homeless people in Manchester: volunteer Dave Kelly meets Rio choir director Ricardo Vasconcellos. Photo: Åsa Westerlund.

Valuing the Ocean

To make connections and build relationships designed to help protect our oceans...

Oceans cover more than 70 per cent of the world's surface. They influence vital natural systems, provide resources, support business, and have cultural value, all essential to our wellbeing. But marine biodiversity and ecosystems are being pushed to the limit by climate change, pollution, over-fishing and other threats. The scale and complexity of the issues are daunting and must be tackled locally and internationally. We are supporting the environmental sector to influence attitudes and decision-making towards sustainable ocean management by increasing its capacity to communicate the real value of our seas.

"It's a real game-changer – locally, nationally and globally"

Marine LAB participant, Plastic Bottle project

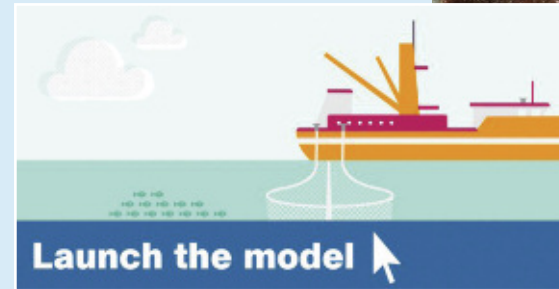


Strand development and achievements

The Gulbenkian Oceans Initiative (GOI) promotes investment in the protection of marine and coastal ecosystems. It supports research, public understanding and policy action in Portugal, a country well placed to champion ocean stewardship at EU and global levels. Our UK Valuing the Ocean strand extends this work. Through an experimental 'Marine CoLABoration' project (the Marine LAB) we work intensively with UK-based NGOs with the skills and ambition to increase the sector's impact. We also support a few influential initiatives with the potential to develop new models and promote cross-sector engagement.

Support summary: £366,280

NEF's Blue New Deal aims to deliver more and better jobs for UK coastal communities; their online model, BEMEF, makes the management of European fisheries more transparent.



Highlights

- Our Marine LAB comprises expert individuals from nine organisations. The objective is to develop collaborative projects which increase the scale and pace of ocean protection, particularly through improved communication of the ocean's value. Facilitated meetings and a workshop trip to Lisbon strengthened a collective vision and mission.
- The Marine LAB will draw on its expertise and networks to plan and deliver a high profile campaign to reduce the use of single-use plastic water bottles in London. It aims to raise public awareness of its impact on the ocean and develop a model for action that can be replicated internationally.
- With the GOI team we showcased our own and partners' ocean-related work at the EU Maritime Day conference in Athens. We also collaborated on projects for Blue Week Lisbon. These projects included the participation of Marine LAB members at the Blue Business Forum; hosting marine funders attending the Economist World Ocean Summit; and an OECD workshop on planning for the marine and coastal environment.

- We partnered with the New Economics Foundation (NEF) on its Blue New Deal initiative to revitalise UK coastal communities and protect their natural resources, and on developing an online Bio-economic Model of European Fleets (BEMEF) to aid sustainable fisheries management. NEF presented its fisheries work widely, including at European Commission meetings.
- We are supporting the Marine Conservation Society to mainstream its Community Voice approach to shared decision-making on use of the sea. The model could be cost-effective in helping local areas, in and beyond the UK, take forward complex EU legislation.

What have we learnt?

- Our role as a foundation in convening a group of experts is to support a shared vision and direction for activities, but not to dictate what these should be. Expert facilitation is essential to the process.

What next?

- We will develop and implement an evaluation framework to capture learning and assess the impact of our initiatives, and a communications and influencing plan that complements the GOI programme.



The Marine Conservation Society's Community Voice model for effective marine management planning is based on a shared understanding of the 'wellbeing' value of coastal resources. Photo: Peter Richardson.



Marine LAB workshops, facilitated by network experts FoAM, provide a selected peer group with opportunities to translate their shared knowledge and expertise into action and change. Photo: FoAM.

Creating the Conditions for Change

To create the conditions for change by promoting social innovation, strengthening civil society and working to advance our own and others' philanthropic practice...

The focus of this cross-cutting strand is to create an environment that supports positive social change, particularly through social innovation and collaboration.

Highlights

- We have partnered with the Big Lottery Fund and Collaborate to explore how funders might work more effectively together to support initiatives from initial idea to delivery at scale. We will be developing this work on the funding ecology during 2016 including by examining its application to arts funding.

“The funding ecology is real ... it is what we have to navigate all the time...”

A New Funding Ecology
– A Blueprint For Action



The Unusual Suspects Festival in Glasgow, 2015. Photo: Social Innovation Exchange.



- We continued to maintain a strong relationship with the Social Innovation Exchange (SIX), supporting the establishment of an international funders' network. We also helped to communicate SIX's value by supporting a report examining its history and achievements.
- Supporting our aim to bring participatory arts into the mainstream, we are launching an Inquiry into the Civic Role of Arts Organisations. The Inquiry will highlight and promote best practice. It aspires to develop a more conducive policy and funding environment for arts organisations actively engaged in and with their communities. We will establish an advisory panel and an international reference group for the Inquiry. We are also contributing to the European Cultural Foundation's research in this field.

What have we learnt?

- Sustaining momentum and taking advantage of opportunities for linking initiatives, together with solid planning, are key; we are working to strengthen this approach.

What next?

- We will continue to develop our approach to evaluating experimental projects and measuring wellbeing and we will consider how we can better support the sharing of learning across our strands.

Support summary: £164,128

Planning for Legacy

To plan for legacy which maximises the ongoing impact of our current strands and to develop lines of enquiry which may form the basis of new priority strands in due course...

Policy influence and engaging other funders have been the basis of our work to consolidate the success of the Making Every Adult Matter coalition. This year we also shared evaluations of our Literature in Translation and Communities in Nature programmes with organisations able to take forward their recommendations.

MAKING EVERY ADULT MATTER: SUPPORTING PEOPLE WITH MULTIPLE NEEDS

Making Every Adult Matter (MEAM), a coalition comprising Clinks, Homeless Link and Mind, was formed in 2008, with our support, to improve policy and services for people with multiple needs. MEAM has developed its work through a network of staff embedded in its partner organisations, by supporting and advising others as they deliver relevant programmes, such as the Big Lottery Fund's 'Fulfilling Lives' programme, and by working closely with government.

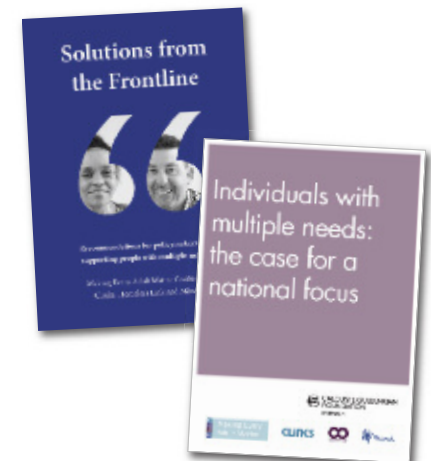
Legacy highlights

- The Foundation and MEAM have worked with government departments to promote a national focus on individuals with multiple and complex needs. MEAM's Voices from the Frontline project has also highlighted the issue and paved the way for the public sector to implement better coordinated interventions at the local level.

- MEAM has brought together networks to share experience and practice. Locally, it developed a new semi-commercial model to support use of the MEAM Approach: thirteen areas are now using this framework to design and deliver better coordinated services.
- We will assist MEAM to explore opportunities with other funders to grow its work, supporting a continued focus on strategy development, evaluation and learning.



Support summary: £80,233



MEAM involved people experiencing multiple needs and those who support them in developing national and local policy solutions. Photo: Kate Lowe.



Pop Up's Fusion school video project, one of 12 initiatives featured in the *Translating Culture* booklet. Photo: Patrick Boyd.



LITERATURE IN TRANSLATION

Over three years, we promoted literature in translation and multilingualism in the UK as a way of deepening understanding between cultures. Our activities helped change perceptions about the importance of this work and supported the development of a much stronger sector network or community of practice.

Legacy highlights

- A programme booklet, *Translating Culture*, showcases initiatives, draws out lessons and recommends next steps. It was launched at Free Word Centre's Creative Multilingualism Day in November.

- We continue to facilitate the Writers' Centre Norwich and Free Word to lead on a strategy to secure the achievements of the translated literature community of practice.
- With our support, King's Cultural Institute will work with an advisory committee to consolidate a 'Multilingual Creativity' network, promote high quality initiatives, and link them nationally and internationally.

Support summary: £50,979

HOW CAN BOTANIC GARDENS GROW THEIR SOCIAL ROLE?

Lessons from the *Communities in Nature* programme

CALOUSTE GULBENKIAN FOUNDATION
UK BRANCH



VALUING NATURE

As we complete our direct support of strategies to help drive change to more sustainable lifestyles through a creative engagement with nature, our focus has been increasingly on assessment and learning.

Legacy highlights

- We published a five-year review of our 'Communities in Nature' (CIN) programme. Led by Botanic Gardens Conservation International (BGCI), CIN aimed to 'grow the social role' of botanic gardens, putting social and environmental responsibility at the heart of their mission. Informed

by interviews, a Peer Review Forum and feedback from international BGCI members, the review assesses the impact of the programme and makes recommendations for future work.

- We will produce a resource booklet to promote the learning from Valuing Nature, and will contribute to the adaptation and growth of the CIN programme through targeted influencing and advocacy activities.

Support summary: £10,751

About the Foundation

WHO WAS CALOUSTE GULBENKIAN?

Calouste Sarkis Gulbenkian was an Armenian born near Istanbul in 1869. He conducted much of his work in Britain, taking British citizenship, lived in France and finally settled in Portugal. He was influential in the early development of the oil industry. He was multicultural and multilingual and spent a lifetime bringing people together from different cultures and nationalities.



Calouste Sarkis Gulbenkian.

The Foundation's headquarters in Lisbon.

WHAT IS THE CALOUSTE GULBENKIAN FOUNDATION?

On his death in 1955, Calouste left his fortune and art collection to a foundation set up as a private institution of public utility under an act of the Portuguese Government. Although he gave extensively to Armenian causes he wanted his Foundation to benefit 'all humanity'. Its headquarters are in Lisbon and it has offices in London (the UK Branch) and Paris. It has assets of around €3 billion and an annual budget of over €100 million.

WHAT WORK DOES IT DO AND WHERE?

The Foundation acts in four areas – arts, education, science, and social welfare – by giving grants and scholarships and through its own projects and initiatives. Most activities are in Portugal but the Foundation's impact is felt more widely and it is becoming increasingly international in fulfilment of its founder's wishes. It works extensively with other major European Foundations.

In Lisbon, in addition to the museum containing the founder's art collection, the Foundation runs a modern art centre, an art library, an orchestra and choir. It also has an international science research centre.

HOW IS THE FOUNDATION GOVERNED?

The Foundation is governed by a board of trustees the majority of whom must hold Portuguese nationality. The founder's great-grandson, Martin Essayan, a British citizen, is now the third generation of his family to serve on the board. He is trustee for the UK Branch and for the Armenian Communities Department.

HOW CAN I FIND OUT MORE?

For further information, consult the Foundation's website www.gulbenkian.pt or the linked website for the UK Branch www.gulbenkian.org.uk



Front cover: The British Council 'Arts for Ageing Society' study tour to Japan for UK arts professionals – supported by the Calouste Gulbenkian Foundation and Baring Foundation – included a performance of *Richard II* by Saitama Next Theatre of young actors and Saitama Gold Theatre of non-professional older people. Photo: © Maiko Miyagawa.

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