

Annual Review

2016/17



CALOUSTE GULBENKIAN
FOUNDATION

UK BRANCH



Our purpose

We are an international charitable foundation with cultural, educational, social and scientific interests, based in Lisbon with offices in London and Paris. The purpose of the UK Branch in London is to bring about long-term improvements in wellbeing, particularly for the most vulnerable, by creating connections across boundaries (national borders, communities, disciplines and sectors) that deliver social, cultural and environmental value.

Our strategy

We are at the mid-point of our 2014–19 strategy. Three targeted strands – Transitions in Later Life, Participatory Performing Arts and Valuing the Ocean – are supported by cross-cutting work on Creating the Conditions for Change, supporting our core values of collaboration and social innovation. In 2016, we also launched an Inquiry into the Civic Role of Arts Organisations. We continue work to secure the legacy of programmes that have reached their conclusion.

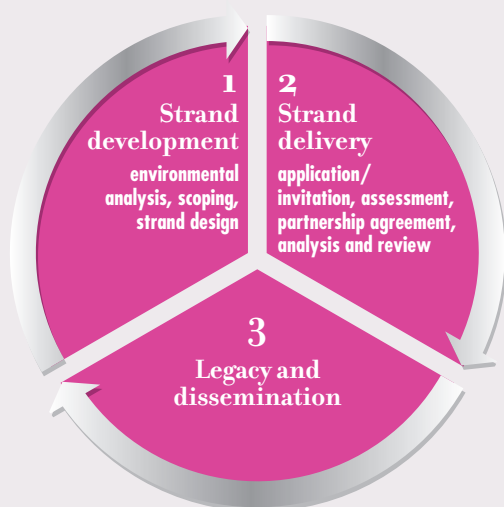


Under our Participatory Performing Arts strand, LIFT (London International Festival Theatre) is working in Tottenham, London, to redefine excellence in participatory practice. Photo: Alex Hyndman.

Front cover: With One Voice – connecting arts and homelessness practitioners across the world – launched at the Rio Cultural Olympiad. Photo: William Rosa/ Agência Visivel.

How we work

We work in a 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 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.

“The dog whistle is not an instrument of harmony. We must listen for the underlying sound that makes it resonate in places and among people whose voices have not been heard.”

Andrew Barnett

UK Branch Director's Report

By any standards, 2016 was a turbulent year. Few predicted its political upheavals. 2017 may bring more shocks, as people go to the polls across Europe and Brexit negotiations begin.

We have special reason to examine our response. We are a foundation rooted in continental Europe. We are concerned to amplify the voices of those who are not usually heard. We work across boundaries, seeking to bring people together to learn, share and develop their practice. But we are also, at heart, about change, about trialling new – and more effective – approaches.

The pages that follow demonstrate the practical ways in which we have put these ambitions into action over the past year. But we have also been reflecting on our role in this shifting world.

Doing our best for others drives our endeavours. Openness and collaboration are in our DNA. It's not about competition. We see a role for organisations like ours working with others in addressing current and future need. We're conscious of the privilege our status as a small part of a large European foundation – endowed in perpetuity – affords us. We hope we earn the trust placed in us: impactful in the UK and spreading the learning internationally. This includes aligning our work with that of our colleagues in Portugal; as this review shows, we are doing this more and more.

How *best* to achieve change? Where are we uniquely placed to act? What more can we do to amplify the impact of our work with partners? What does success look like? What might we have got wrong? In 2016, we asked ourselves two specific questions. Is our strategy on track? Does it fit the apparent new world order?

The context, internationally and nationally, feels changed. But perhaps it's just the expression of a feeling that was already there. Brexit is only part of it. The consequences are unlikely to be so bad, or so good, as some suggest but uncertainty affects the vulnerable and underserved disproportionately. We hope for close relations with continental Europe and an end to intolerance. If we are to protect the planet we share, individual acts must combine with collective action, including across national boundaries.

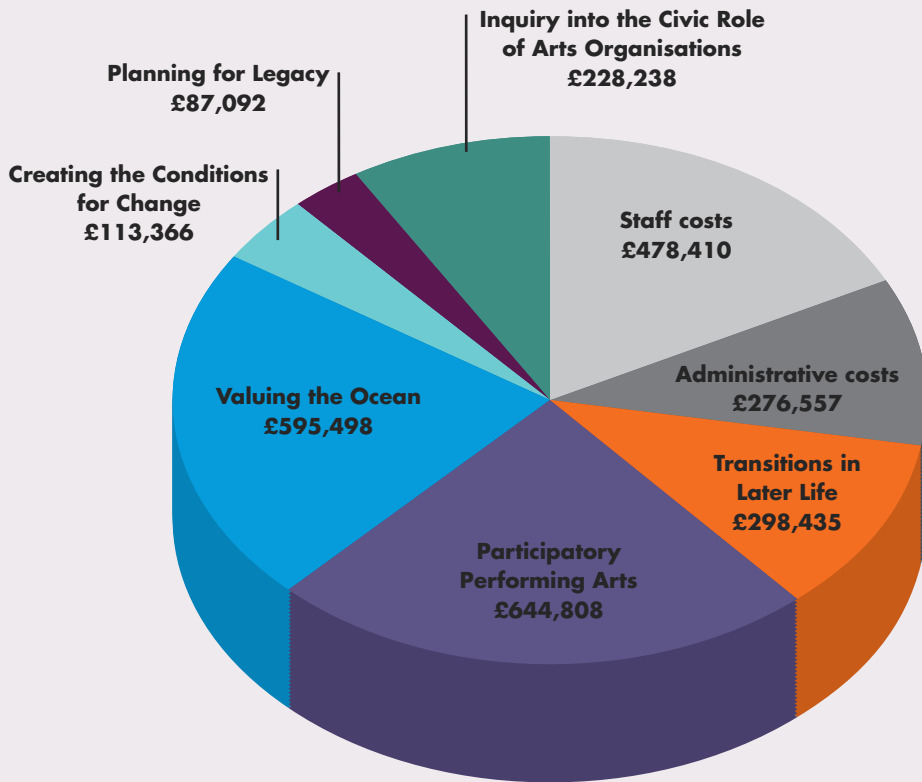
We asked what all this means for our mission and for the priorities we chose in 2014. This Review reports on our activities against those priorities:

- improving the wellbeing of those in later life with new ways of preparing for retirement, through our Transitions in Later Life programme (see pages 4 and 5);
- promoting wider participation in the arts, especially by those who are excluded, through our Participatory Performing Arts programme (see pages 8 and 9) and with the new Inquiry into the Civic Role of Arts Organisations (see pages 10 and 11);
- conserving the ocean, the depletion of which threatens us all and the vulnerable yet more, through our Valuing the Ocean programme (see pages 6 and 7).

This all feels more relevant, not less. This year's problems are little different to last year's: an ageing population, social fragmentation, depleted natural resources inequitably distributed, to mention a few. The qualities that distinguish charitable foundations remain constant: exercising foresight and supporting less popular causes, bringing together unusual suspects, acting across boundaries, as catalysts not just funders. We should continue to seek to address causes over symptoms. We need to seek out those who might not tell us what we want to hear. We need to be more European, not less.

An external review of our work midway through our five-year strategy was helpful. Going forward, we will develop our people so we can more effectively support the incubation of new approaches to policy and practice. We will continue to strengthen our processes, including around evaluation. We will build our profile and understanding of how we work, not for their own sake but to support delivery against clearer measures of

Financial Summary UK Branch 2016



impact. We will survey those we work with to determine how our 'value add' is perceived and how we might improve it. As this Review shows, we are already moving forward on these aims.

For sure, the dog whistle is not an instrument of harmony. We must listen for the underlying sound that makes it resonate in places and among people whose voices have not been heard. In 2017, we will reach out more. Co-designing initiatives with beneficiaries – a common theme throughout these pages – will feature yet more across all our work: not just 'for' and 'to' but 'with' and 'by'.

In essence, this is about values: the things we cherish and promote. We will explore this framing more this year. It's also about foresight. We may not have predicted last year's turbulence but listening, future-proofing, acting locally and thinking globally are themes that run through all our work. They will do so more in 2017.

Andrew Barnett

Transitions in Later Life

Helping people in mid- to later life feel better supported to manage change as they age...

We want to support people in mid- and later life to respond better to major life changes, such as retirement. Changes at this time – in personal circumstances, health, role, friendships, home – can feel destabilising and distressing. But advice for those of us coming up to retirement pays scant regard to these; the emphasis is on financial planning. We believe that pre-retirement policies and services must cover a broader range of issues related to quality of life and emotional health and wellbeing. Our ambition is to develop a holistic approach that will future-proof chronic health and social issues in later life.

“I want to talk about life, not retirement.”

Susan, Make a Change co-design participant

Strand development and achievements

This strand builds on longstanding work helping to establish the Campaign to End Loneliness in the UK, and with colleagues in Lisbon on Ageing and Social Cohesion. This year, we moved from scoping to piloting, with co-design and collaboration embedded throughout. Ten projects

are modelling inspirational initiatives for people in pre-retirement, using therapeutic approaches such as mindfulness and CBT. We are also supporting strategic projects focused on pre-retirement and understanding how this work can become sustainable. Our new partnership with the Centre for Ageing Better will help us increase the evidence base about which approaches best help people to develop wellbeing and resilience.

Support summary: £298,435

The Age Does Not Matter festival gathered designers, citizens, and representatives from government, brands and other organisations to share thoughts about making the most of the future. Photo: Stella Malfilatre.



Below: Interim evaluation of the first Social Impact Bond on reducing loneliness suggests a positive impact on individual wellbeing with corresponding savings for services.



Above: The Age Does Not Matter festival in September aimed to disrupt the narrative on ageing and challenge stereotypes. Photo: Stella Malfilatre.

Highlights

- We entered a major partnership with the Centre for Ageing Better. Ageing Better brings expertise in evaluating and sharing evidence of what works in supporting people in later life, and will help us to work with a range of organisations, including employers, and ensure we translate evidence into real impact.
- We supported the 'Age Does Not Matter' festival, dedicated to rethinking the concept of ageing. The Age of No Retirement brought together 750 business leaders, creative thinkers, policy-makers, academics and citizens. They spent four days reimagining products and services through co-design labs, talks, installations, photography, stories, sound and film.
- After successful pilots in three cities, SP Transitions is expanding its Retirement Transition Initiative into a sustainable social enterprise, Envisage CIC. This will provide community workshops for those with low to no income approaching retirement, as well as scaling up the existing employer-based programme.

- The Innovation Unit has developed a blueprint pre-retirement club, co-designed by users. Make a Change is a service for those aged 50+, particularly men, whose experiences of retirement tend to be more negative. It aims to improve wellbeing by combining volunteering, mindfulness and courses delivered through employers.
- We have established a Learning Community for ten organisations we are supporting to test diverse methods of pre-retirement support. The community met three times this year to exchange learning and will continue to meet and grow, championing the need for holistic support in later life.

What have we learnt?

Collaboration with organisations with complementary strengths increases our impact through better evidence on what works and broader reach. We also need to address demand for these services and will be working with employers and other service providers on this.

What next?

The programme evaluation is due in Spring 2017. We will also be releasing a podcast series, telling the stories of individuals who participated in the projects we have funded.



An exercise at a Transitions in Later Life Learning Community, where participants shared the challenges their work is facing.

Valuing the Ocean

Connecting and building relationships designed to help protect our ocean...

We want to communicate the many ways our ocean contributes to human wellbeing, culture and prosperity. The ocean is under pressure due to the prevailing emphasis on short-term exploitation of its resources. The damage will affect us all, but those most disadvantaged will be hit hardest and first. We are testing the hypothesis that promoting shared values and new narratives for marine conservation will deliver better outcomes for people and the planet. Our ambition is to strengthen collaboration and the capacity of the environmental sector to take new approaches forward.

Right: The ten Marine CoLAB members bring a range of perspectives and new approaches to countering the threat to our ocean.

“There is only one ocean, we are all connected...”

Heather Koldeway,
Zoological Society of London



Strand development and achievements

This strand complements the Gulbenkian Oceans Initiative (GOI) led by our colleagues in Lisbon. A key part is our Marine CoLABoration ('Marine CoLAB'), a group of diverse experts who come together to explore new ideas, take action, reflect on the results and share them widely. The Marine CoLAB is purposefully experimental, aiming to develop and test the smallest viable 'experiments' that can contribute towards communicating the value of the ocean more effectively. Ocean protection in the UK is shaped by EU law, and we will be watching as Brexit negotiations develop.

Support summary: £595,498



Representatives from Portuguese environmental NGOs visited London in July to exchange learning and ideas.

The first Marine CoLAB experiment, the #OneLess campaign, launched on World Ocean Day. It aims to reduce the number of single-use plastic bottles ending up in the ocean via the Thames. Photo: Thames21.



Highlights

- We commissioned the FrameWorks Institute to analyse how the marine conservation sector communicates with public and policy-makers, how the public thinks about the ocean and where the challenges lie. We hope its findings will help NGOs build a common narrative to bridge the gap between expert and public understanding of protecting the ocean.
- We have committed another two years' funding and support for the current Marine CoLAB members. From 2017, the CoLAB will have a fulltime coordinator to enhance collaborative action and learning between member organisations and with the wider marine community.
- Through the Marine CoLAB, we are empowering 'Agents of Change', a network of new and unexpected advocates of marine conservation connecting targeted work within selected coastal communities.
- The Marine CoLAB co-created the #OneLess campaign to transform London into a city free of single-use plastic water bottles by 2021. Plastic pollution is a major threat to the world's ocean. #OneLess will show the world what's possible in a global capital like London. The campaign

includes strategies to encourage more sustainable waste collection and water delivery systems, monitor plastic pollution in the Thames, and connect Londoners to their impact on the ocean.

- NEF launched its report, 'Turning Back to the Sea', at Westminster. This action plan sets out a nationwide Blue New Deal to revitalise coastal communities. It puts people in control so they can shape local priorities, and increase prosperity and wellbeing underpinned by healthy seas.

What have we learnt?

Developing 'experiments' allows work to be both purposeful and flexible. We have started by building connections through co-designing these; now we need to change gear and articulate the impact we seek. Evaluating experimental approaches remains a challenge.

What next?

We are defining more precisely the change we want to see. We will take forward the FrameWorks Institute's findings and explore the potential of a Manifesto for the Ocean for underpinning coherent and collaborative action.



Experts working with the GOI introduced the Natural Capital Protocol to help businesses assess risks from unsustainable use of natural resources.

Participatory Performing Arts

Widening participation in the performing arts in all communities, especially the most vulnerable and underserved...

We want to open up the performing arts for everyone. The arts have untapped potential to give a platform to those whose voices are seldom heard in mainstream society. Through participation in the arts, marginalised people discover strengths, forge social connections, increase confidence and gain a voice. The creative process highlights what disadvantaged people can do, not – as so often – what they can't. In turn, encompassing diverse, authentic experiences enriches artistic works. Participatory practice is central to making work that combines these artistic and social outcomes. Our ambition is to bring participatory performing arts into the mainstream.

“Creativity is in all of us ... we don't always have to be defined by our problems.”

Matt Peacock, With One Voice

Strand development and achievements

We are supporting ten ground-breaking productions through 2016–18. Co-created with participants, these diverse projects all push artistic and social boundaries. Innovation is the hallmark of this programme. We are exploring better ways of

disseminating our learning, being open in our conversations and sharing closely with other funders. We are reaching out internationally, working closely with our colleagues in Lisbon and with practitioners worldwide. We are exploring innovative approaches to recording evidence and measuring impact. We have also launched the Inquiry into the Civic Role of Arts Organisations to galvanise a movement around developing this work (see page 10).

Support summary: £644,808

One of our legacy projects, Sacred Sounds Women's Choir, sang in Lisbon to celebrate the Foundation's 60th birthday.



Below: Pop-up choirs of homeless people performed in Rio to mark the launch of *With One Voice*. Photo: Agencia Visivel.



Above: We contribute to the Arts Impact Fund, a collaboration providing loans to arts organisations like Live Theatre, Newcastle, that can show social impact. Photo: Live Theatre, Newcastle.

Highlights

- Following our open call in 2015, we are now supporting ten productions that take risks with new ways of working. All have been co-created with people from marginalised groups, including underrepresented communities, older people, women, young people, those recovering from substance misuse, disabled veterans, prisoners and disabled musicians.
- Capturing evidence from the performing arts is a challenge. We are trialling new ways of recording impact. We have commissioned a filmmaker to follow one individual on each project through production to performance to show how their participation affects their lives.
- We are pooling expertise with our colleagues in Lisbon through a peer learning group, the Arts and Social Impact Group. We are also collaborating with the Esmée Fairbairn Foundation and the Paul Hamlyn Foundation, who share our belief in the power of participatory arts to inspire social change.

- Our ten production partners come together as a Learning Community for seminars with the Esmée Fairbairn Foundation and Paul Hamlyn Foundation projects. The community shares practice and discusses creative solutions to the pressing questions facing arts organisations developing participatory work.
- *With One Voice (Uma Só Voz)* was launched at the Cultural Olympiad in Rio de Janeiro. This international movement connects arts and homelessness practitioners to strengthen practice across the world. Our support stems from 2012 when, with Streetwise Opera, we put on an event at the Royal Opera House with 300 performers who had experienced homelessness.

What have we learnt?

Pooling knowledge with Lisbon colleagues and other foundations supports internal learning and all participants gain new insights. Funding projects repeatedly does not necessarily allow organisations to embed new practices. Changing the power dynamics between funders and project holders takes time.

What next?

We are piloting a co-designed evaluation toolkit with the Participatory Performing Arts participants. This explores how to measure outcomes for participants, audiences, social sector partners, arts organisations and practitioners engaging in participatory performing arts.



Learning Community seminars have discussed artistic and social values, collaborating with the social sector and representing marginalised experiences.

Inquiry into the Civic Role of Arts Organisations

Working with people and organisations to develop a strong and growing movement of arts organisations that embrace their civic role...

We want to help realise the potential of arts organisations to promote civic engagement and revitalise communities. Launched in 2016, this Inquiry seeks to increase awareness of the civic role that arts organisations play. Through research and consultation, we want to understand what it means now and what future cutting-edge practice may look like. In partnership with arts and civic society practitioners, we will craft recommendations for policy change and practical support. We hope the Inquiry will break new ground by engaging the widest range of people. Our ambition is to galvanise a movement of arts organisations committed to playing a civic role.

“We can together create a new culture – truly accessible to all, because it is created by all.”

Stella Duffy, Fun Palaces

Phase 2 will identify potential levers for change and routes to impact, and pilot approaches to civic role practice. Phase 3 will develop an implementation and legacy plan. Our commitment to co-design and innovation is fundamental to the Inquiry. We are seeking high levels of involvement from across the sector.

Support summary: £228,238

Inquiry development and achievements

Whereas our Participatory Performing Arts strand is about widening participation, this three-phase Inquiry is about giving organisations the space to consider their own practice. Phase 1 has sought to define the territory.

The National Theatre of Scotland’s *Home Away* saw ten participatory performing arts companies performing a new piece of theatre exploring their place in the world – the experiences which connect and the forces which isolate us. Pictured are performers from Chicago. Photo: Jassy Earl.



Below: The Inquiry wants to explore why arts organisations are often less diverse than the communities they serve. Photo: Alison Baskerville.



Above: The Inquiry is using social media, a dedicated website, community-based work and co-created artistic commissions to reach as many people as possible. Photo: MattWainwright.tv.

Highlights

- We have set up an Advisory Panel of leaders from the arts, social, cultural, public and private sectors to check and challenge the Inquiry's work. The Inquiry is also supported by an International Reference Group, including expertise from our colleagues in Lisbon.
- The Advisory Panel has devised three metaphors to frame thinking: arts organisations as 'colleges' (places of learning), 'town halls' (places of debate), and 'parks' (public spaces). These have contributed to a working definition of the civic role, which has tested well in twelve workshops across England and through an open online survey of the arts and civic society sector.
- What Next? and Locality have commissioned three artists to co-create work with underserved communities to demonstrate what they think art's civic role could be. Projects cover a multimedia collage in Southwark, pop-up cafes in rural Shropshire designed for people living with dementia, and a documentary film with young people in Manchester.

- What Next? chapters in Sunderland, Basingstoke, Nottingham, and Yarmouth and Lowestoft are carrying out in-depth local studies. They will map their local arts infrastructure and ask audiences and stakeholders what civic role the community wants and expects their arts organisations to play.
- Our evaluation of Phase 1 suggests that the civic role is a live issue in our changing world, but means thinking 'hyper local' as the situation across England varies so much due to the substantial differences (for example, the level of affluence or ethnic diversity) from place to place.

What have we learnt?

We need to consider definitions of the civic role in terms of the individual and collective actions they inspire. Some of the individuals and organisations we have consulted have told us it takes time to buy into new language.

What next?

In 2017, we will continue conversations across England and in Portugal, inviting arts organisations to shape the solutions for playing a civic role.



Matt Hancock, minister responsible for culture policy, spoke at a feedback event on the Inquiry's first phase.

Creating the Conditions for Change

Promoting social innovation, strengthening civil society and working to advance our own and others' philanthropic practice...

Our specific strands support different types of change – cultural, organisational, corporate, policy or 'big system'. This cross-cutting strand supports them by focusing on creating the best environment for innovative social change.

Highlights

- Given our long relationship with the Making Every Adult Matter (MEAM) coalition, we are supporting them to provide expert representation on the new Independent Commission on Social Metrics. The Commission seeks to develop ways of measuring poverty that both identify those in poverty and have long-term political support.

“Greater connectivity is critical.”

Andrew Barnett

- We maintain strong links with the Social Innovation Exchange (SIX) and continue to participate actively in initiatives to foster innovation and collaboration globally.
- At the beginning of 2016, we took part in a consultation on leadership in the sector. We have been pleased to support the Clore Social Leadership Programme to instigate working groups for a 'Generous Leadership Lab'. Working alongside the Office for Civil Society and Big

Lottery Fund, we look forward to helping this initiative develop further in 2017.

What have we learnt?

Bringing together those seeking complex social change makes us all more effective, whatever our particular priorities.

What next?

With six leading funders, we are supporting the new Independent Inquiry into the Future of Civil Society. This aims to provide a clear vision for the role of civil society in England over the next ten years.

Support summary: £113,366



We are supporters and members of the SIX Funders' Node, an international network for innovative funders to share practice on change. Photo: SIX.

Planning for Legacy

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

We seek to hand on the baton to advance work we have helped start. We produce learning publications, showcase projects to leverage funding and promote the policy change they seek, and support new networks or infrastructure. We also take our learning forward into our own new programmes.

Our five-year programme showing how botanic gardens can add social value concluded with an event at the Royal Botanic Gardens in Edinburgh, and the launch of a learning booklet from our Valuing Nature programme. Photo: Royal Botanic Gardens Edinburgh.

Highlights

- We are delighted that the Making Every Adult Matter (MEAM) Coalition, supporting people with multiple needs, has secured £2.78 million funding from other sources. It can now expand across England over the next five years, scaling up work piloted eight years ago with our support. We remain on the MEAM board.
- The Campaign to End Loneliness (CEL) has received £2.65 million over the next four years from the Big Lottery Fund to pilot further activities in England and expand into Scotland and Wales. We convened the organisations that developed the Campaign five years ago and have supported its work since. We remain on its board but are taking our interest forward from

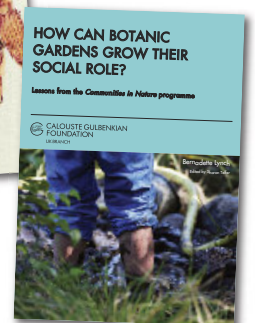
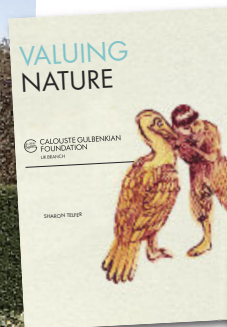
a different perspective, through our Transitions in Later Life strand.

- We wound up our involvement in Literature in Translation this year. We are happy that these projects have informed work being taken forward by Writers' Centre Norwich, FreeWord Centre and English PEN, supported by the Arts Council.

What have we learnt?

These projects show what a very small foundation can achieve with a relatively small amount of money by bringing ideas and people together in a way that then attracts bigger funders. This concept is now central to the way we work.

Support summary: £87,092



About the Foundation

WHO WAS CALOUSTE GULBENKIAN?

Calouste Sarkis Gulbenkian was an Armenian born in Constantinople (near today's Istanbul) in 1869. He conducted much of his work in Britain, taking British citizenship, lived there and 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.



WHAT IS THE CALOUSTE GULBENKIAN FOUNDATION?

On his death in 1955, Calouste Gulbenkian 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.

Calouste Sarkis Gulbenkian.

The Foundation's headquarters in Lisbon.

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, see our website: www.gulbenkian.pt or the linked website for the UK Branch, www.gulbenkian.pt/uk-branch.

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