How we work with partners

CALOUSTE GULBENKIAN
FOUNDATION

UK BRANCH

Guidance for organisations
we support

Contents

1. Introduction

Our purpose

The Calouste Gulbenkian Foundation is an international charitable foundation based in Lisbon with branches in London and Paris. Committed to all humankind, its mission is to support sustainable development by actively promoting the wellbeing and quality of life of vulnerable groups in the population, and in balance with environmental protection and economic prosperity.

Based in London, the UK Branch sits at the heart of a world centre for philanthropy. This enables us to deliver on the Foundation's mission using our networks and experience. We are focused on building coalitions to address complex global problems. We look ahead, thinking globally and acting locally, to create the conditions for change by connecting across borders of all kinds – national, cultural, organisational, disciplinary and social. We prioritise the vulnerable and underserved in the UK and elsewhere.

Our founder

Calouste Gulbenkian was an Armenian born near Istanbul who worked in Britain and became a British citizen, lived in France and died in Portugal. He was multi-cultural, multi-lingual and spent a lifetime bringing people together from different cultures and nationalities. He thought of himself as a business architect rather than a businessman and was responsible for brokering some of the largest commercial joint ventures the world has known. In endowing the Calouste Gulbenkian Foundation, he wanted others to benefit from the legacy he left.

This booklet

We seek to be outcome-orientated and place a significant emphasis on evaluation and communicating the learning from the work we support to those with the power to make change. This short booklet sets out our ambitions and expectations in building and maintaining successful partnerships. It covers our approach to partnership, evaluation, learning and communications.

2. Summarising our approach

Our hallmarks

We seek an impact greater than our limited resources might suggest

- We believe in balancing the long view with quick wins that inspire confidence in uncertainty
- This means looking over the horizon and helping each other to make the best use of resources

The big picture is important to us

- We believe we all play different roles in a complex ecosystem
- Comprehension of where we are best we're placed to act and join the dots

We can't achieve anything alone

- We believe and promote collaborative relationships
- This means being open to difference, having the right conversations, and learning collectively

We are curious and enabling of others

- We believe evidence is important and the solutions are out there
- This means being creative, flexible and receptive to the outside world as well as investing in our own development

How we work

We will help to create the conditions for longer-term change. We will:

Connect - Reaching out through communities to support collective innovation in the UK and beyond.

Collaborate and experiment across boundaries – working with organisations with complementary strengths to co-create change.

Communicate the value of our learning strategically – disseminating our learning to those who can act on it and work with those who can amplify our voice.

Capacity-building - Building skills and establishing a strong legacy before moving on.

3. An approach based on partnership

We are interested in working with organisations to identify needs and to develop projects, which address them. We seek to work with organisations developing ˈnext practice', trialling new - potentially more effective - approaches or addressing unmet needs. Often we will play a role in the development of new initiatives. We have for example, played a catalytic role in the formation of the Making Every Adult Matter coalition and the Campaign to End Loneliness.

How we select partners

We select partners proactively through a rigorous process of: research, engagement in a wide range of networks, and open consultation. We also sometimes issue ˈcalls' for applications. These may be completely open or we may invite a defined group of organisations to submit proposals for initiatives that meet particular criteria.

We are enthusiastic about funder collaboration and because we want to remain open to proposals from peer organisations – trusts, foundations and other funders – to collaborate in projects that meet our priorities.

What the Foundation can offer

Our partner organisations have the skills and expertise, which ensures that our strands of work create lasting value. However, we also have strengths to contribute. We can offer advice and support based on our understanding of social and cultural affairs in our focus areas; we can often facilitate connections between organisations, bringing together effective learning communities; we can help distil and disseminate the lessons from work we are supporting; and we can challenge our partners, where appropriate, to be more ambitious for their work (see section below, which explains in more detail what we offer beyond funding).

Our offer beyond funding

The table below shows the type of support we offer our partners. We are a relatively small team, which means that we are unable to work intensively on a one-to-one basis with every organisation we support throughout the period of funding. Our approach is to concentrate our resources on assistance for the cohorts of organisations we are working with in order to deliver our strands. We work with them as a group on, for example, evaluation and learning and access to other sources of funding. There are a small number of organisations that we are core funding over an extended period, which receive more concentrated support, particularly those in the start-up phase. We are also committed to helping any organisation that is experiencing difficulties in delivering the project we are supporting through helping either directly ourselves, where we have the expertise, or by purchasing tailored consultancy support.

How?	What?	Why?
Convening (meetings/seminars/conferences/dinners/workshops)	Groups of organisations working in particular fields/other funders/policy makers and opinion formers	To promote shared learning and the development of next practice/to develop our understanding of the issues we work on to enable us to make better decisions/to promote particular issues or approaches increasing their currency
Commissioning research/analysis/policy papers	Literature reviews, research scoping a field, research to plug gaps in the knowledge base, comment pieces.	
Supporting international exchange	Providing funding for participation in study tours/attendance at conferences abroad.	
Brokering relationships	Between organisations of different scales and sectors and between supported organisations and possible funders	To help strengthen individual projects and the particular cohort and increase the likelihood of them achieving what they are seeking to achieve.
Strategic advice to individual projects	Evaluation and learning, communications, influencing, financial management.	

Support with specific aspects of project delivery	Rent-free office space for a limited period for one organisation.
Accommodation for individual projects and access to meeting space	Free access to our meeting spaces a couple of times a year dependent on availability.

Our principles for successful partnership working

- Shared commitment to goals and an ambition to achieve change;

- Shared understanding of the nature of the partnership, its purpose, objectives and duration, and what each partner will contribute;

- Mutual respect and developing trust maintained throughout the lifetime of the partnership and beyond, including through shared acknowledgement;

- Open and honest communication with a willingness to share information, including about problems which may arise on either side so that the partners can deal with these together and learn from them;

- Mutual flexibility and responsiveness with a willingness to amend programmes in response to emerging evidence or changing needs and circumstances;

- Shared commitment to evaluation, learning and dissemination.

4. Monitoring, evaluation and learning

Our approach is based on embedding evaluation and learning into our three main activities: programme or strand development, delivery and work on legacy and dissemination (see figure 1 overleaf). It is informed by the *Funders' principles and drivers of good impact practice*, produced as part of the Inspiring Impact project. We appreciate that we have much to learn from our partners about this topic and we propose over time to adapt and refine our approach based on this learning.

Inspiring Impact

Inspiring Impact is a programme that aims to change the way the UK non-profit sector thinks about impact and make high-quality impact measurement the norm for charities and social enterprises by 2022. The website http://inspiringimpact.org/ provides valuable resources and tools for the sector.

Why are monitoring, evaluation and learning important?

Monitoring, evaluation and learning underpins strategy and planning and enables organisations to continuously improve. It helps us, and the organisations we partner with, to deliver greater impact. We are concerned to evaluate and learn from our work so that we can be a reflective funder, able to:

1. Develop knowledge and move practice forward, thus contributing to a wider legacy.

2. Help our partners to build capacity by facilitating peer learning.

3. Learn and develop our own practice, sharing this knowledge with other funders.

What principles underpin our approach to monitoring, evaluation and learning?

Targeted

We will focus our resources on exploring key questions and evaluating outcomes and only collect data we intend to analyse and use in our reporting and dissemination activities, while remaining receptive to the unexpected. Where possible and appropriate, this should include quantitative data and a baseline should be established against which change can be assessed.

These questions will help us develop new strands of work, ensure we are developing new knowledge and interrogate our funding practice. For each programme, we will be explicit about the lines of enquiry we are pursuing. We will publish a change narrative

that sets out the hypotheses we are testing, describes the positive change we aspire to bring about and how.

Engaged

We will determine an area of inquiry and then refine and develop this over time through ongoing discussion with stakeholders.

Participative

We will seek to understand our contribution to positive change by providing opportunities for direct feedback from both our 'direct' partners (i.e. organisations that we fund or collaborate with) and our 'indirect' partners (individuals/communities/organisations that our grant partners work with).

We aim to use engaged and engaging evaluation techniques to learn and explore alongside our partners on issues and ways in which they work, and how we can best support them to achieve positive change. Where appropriate, this may include creating learning communities for partner-led conversations.

Ambitious yet realistic

We will appreciate the limits of our capacity and ensure that the resources we are dedicating to evaluation and learning deliver maximum benefit.

Relevant

We will be clear about what we can contribute to the collection and dissemination of knowledge on particular issues and whether we will work alone or with other expert organisations.

Appropriate methods will be used to answer questions for specific programmes. We base our approach on tried and tested methodologies (a theory of change, outcomes mapping etc). However, we do not follow these unconditionally but take their basic principles and practices and use them in a manner that is appropriate to the activity i.e. what we are seeking to achieve, and level of resources invested. Where appropriate we will employ innovative 'next practice' methods.

Supportive

We will seek to support partners to develop their evaluation and learning practice. We should ask partners about the resources they need for evaluation and learning and make this a consideration in deciding the level of grant awarded. We recognise that evaluation is a dual responsibility and will work in collaboration with grant partners to collect the data we need.

Embedded

Our evaluation work should not be siloed and instead embedded in our working culture as we seek to continuously learn and improve our practice.

How we propose to work with you to evaluate and learn

Outcomes

For each programme or strand we will generally establish at the outset an evaluation and learning framework. We will ask you to help us develop and refine this framework. We will negotiate with you some outcomes, as appropriate to your project, which align with this framework. These outcomes will be detailed in a partnership agreement we will ask you to sign. We will ask you to collect the necessary data to demonstrate progress in achieving the outcomes set. (Your programme manager can help you with this.)

The evaluation and learning framework for each programme or strand will include learning questions we are seeking to answer/hypothesis we are seeking to test. When we ask you to report, we are likely to ask you to provide data/comment on these also.

Reporting

We require each of our partners to provide us with final and also interim reports. The data from these reports is used, together with any other data collected, to inform the independent evaluations we commission of each of our programmes or strands. (See the next section which provides more detail about our standard reporting template).

Communities of practice/learning communities

We seek to develop communities of practice/learning communities, which will bring together the organisations or projects supported under each programme or strand to discuss their practice and share learning.

Feedback from beneficiaries

We are likely to want to hear direct from the people or organisations you work with about the outcomes of your work. We may therefore ask you to request these individuals/organisations to fill in survey forms or provide feedback in other ways. We will use responses to produce aggregate data about the outcomes of our programmes or strands.

A note on how this approach will be applied

The essentials of our approach are described here in a linear way in the interests of clarity. However, we are flexible and recognise that when properly understood, work on social and environmental change can be complex and untidy. This note is intended only as guidance and we propose to review, develop and refine our practice as our experience grows.

Our experience so far means we recognise that:

- Much of the work that we support is new or exploratory; this means that it may be difficult to determine clear outcomes at the outset, however, we should at least be able to state a clear hypothesis; there may be unintended outcomes from funded work

and negative as well as positive outcomes and we are equally interested in understanding these;

- The desired outcomes of funded work may be achieved long after the funding period has ended; generally our interest is in the progress being made towards achieving particular longer term outcomes during the period of our funding and the development of appropriate milestones to indicate progress (sometimes referred to as intermediate outcomes);

- While evidence or data is important, it needs to be contextualised, we are not only interested in what happened but also in why it happened and the conditions that enabled it to happen;

- Stories are as important as hard data because they can help to contextualise it and make it real;

- We are, we hope, helping you to achieve positive social and environmental change through the work we support, but a myriad of other players and environmental factors are also in play and so the most we can claim is that our support is making a contribution to the change achieved.

5. Reporting

We ask all of our partner organisations for a brief interim and final report on their projects in order to:

- Determine the change (what and how) that our support is contributing to achieving;

- Answer specific questions or examine specific hypothesis which are of concern to us (we aim to develop and deepen knowledge in each of our activity strand areas);

- Gather and share learning from individual projects and funding strands;

- Improve our understanding of how we might support organisations in the future.

Please keep these reports brief, with a maximum of five sides of A4.

Please be candid as that is how learning is captured. **We will also need to see a simple budget breakdown of how the funding was spent.** This will usually respond to the original budget outlined in the grant proposal.

Your partnership agreement may specify the particular reporting requirements for your project and these will tend to vary by programme or strand but generally we ask that the following information is included in interim and final reports:

1. Summary of what has been achieved

An explanation of the outcomes that have been achieved or the progress you have made towards achieving them. In doing this you should refer back to the outcomes set out in your original partnership agreement and/or any subsequent amendment we have agreed to.

You should provide the evidence for these outcomes. This might come from a range of sources including: feedback from beneficiaries, staff, volunteers, experts you work with (e.g. formal or informal meetings) as well as more formal research exercises including consultations and surveys.

We are interested in stories, testimony or case studies about outcomes (where you have them – but please do not prepare them only for our benefit) in addition to hard data, as they provide important context.

2. Account of the particular challenges or opportunities that emerged

We tend to like to know if particular things that happened (e.g. staff changes) or general environmental factors (e.g. a change in government policy) that made it difficult for you to achieve the outcomes you were expecting? Did new opportunities emerge for you to pursue/develop the work? And, how did you respond?

We ask this in order to put the progress you have achieved in context; we would like to understand not only what change has happened but also why it happened or what prevented it from happening?

3. Discussion on what you have learned or are learning from this work

Please tell us what you learned by delivering this work; both how it has advanced your knowledge of the subject area and how it has advanced or helped to change your organisation's practice?

Here, you might refer to the specific learning questions established for the programme or strand i.e. the questions it was seeking to answer or the hypothesis it was seeking to examine. (See your partnership agreement).

4. Note on any broader impact that the project has achieved

We also like to know if the project has had a broader impact beyond your organisation and its direct beneficiaries? For example, have you contributed to positively changing key stakeholders attitudes, strategy or practices? Have you made a contribution to the knowledge base beyond that described above?

5. Comments that you have about our funding approach – things we could do better at any stage of the process and how

We are always striving to improve our funding practice and welcome your comments about how we work.

6. Budget breakdown

We will also need to see a simple budget breakdown of how the funding was spent. This will usually respond to the original budget outlined in the grant proposal.

6. Communications

Communications and public affairs work

The Foundation is committed to maximising the beneficial impact of its funding and to bring about change. We are therefore keen to promote our partners' work and to collaborate with our partners to disseminate learning. Please liaise with [Jessica Bridges](#) on all matters of communication, public affairs and shared learning.

Reports, research, publications, evaluations, videos etc.

Please send us drafts of reports and other materials whose production we have supported for comment before publication. We are happy to provide forewords/prefaces/material for introductions. We can also help with dissemination through our website and networks. Please provide at least one final copy of any funded report, publication, video, CD, programme, flyer etc.

NB: Please see the section below regarding acknowledgement and logos.

Guidance on Intellectual Property

We believe that the public interest is best served by any protectable intellectual property created under a grant being owned by the partner organisation as the recipient of the grant. The partner will grant the Foundation a non-exclusive royalty fee licence to use and publish parts of the new work produced as a result of the grant without limitation.

In the case that the partner organisation ceases to exist or the partner organisation chooses not to take the work forward, ownership of any protectable intellectual property produced under the grant will revert to the Foundation and may be used by the Foundation under the non-exclusive licence.

Some partners may wish to make their work funded by the Foundation available through open licensing. For guidance on Creative Commons Attribution you can visit https://creativecommons.org

Events

Please keep us up to date about events you are planning in connection with the work we are supporting, including conferences, launches, policy briefings and other gatherings. We may be able to host events at our Hoxton Square offices or make rooms available for meetings, round tables and seminars. Please invite the Director or appropriate Gulbenkian personnel to events related to the work.

Media campaigns and news

Please inform us of publicity – good or bad – about the supported work. Please provide drafts of media releases before they are issued. We can provide quotations for inclusion. Please include the following paragraph about the Foundation in the Notes to Editors:

> The Calouste Gulbenkian Foundation is an international charitable foundation based in Lisbon with branches in London and Paris. The fundamental purpose of the Foundation is to improve the quality of life for all throughout art, charity, science and education.

> The UK Branch helps build coalitions to address complex global problems. It looks ahead, thinking globally and acting locally, to create the conditions for change by connecting across borders of all kinds – national, cultural, organisational, disciplinary and social. The UK Branch prioritises the vulnerable and underserved in the UK and elsewhere.

Please email [Jessica Bridges](#) for approval if you wish to amend this paragraph. Please also contact Jessica if you would like a quotation for inclusion in media releases.

Acknowledgements and logos

Please acknowledge the Foundation's support in all printed, electronic and other materials related to the work supported (reports, leaflets, brochures, posters, written or spoken presentations, websites, videos, CDs, programmes etc.).

Please use our full name: 'Calouste Gulbenkian Foundation (UK Branch)' in written acknowledgements and include our logo wherever appropriate, with the credit line: 'Supported by' above the logo.

The logo is available in different formats [here](#). It is supplied in black and white in one size only.

The logo is always black or white. **NEVER** directly apply colour effects to the logo. The brand palette is primarily black on a white background but this can also be reversed and the logo can be placed on a black or coloured background i.e. white out of background.

The logo should aesthetically be the same size as partner logos.

Please send [Jessica Bridges](#) a proof or screenshot so that we can approve the use of our logo before you print or distribute or contact her for further advice/clarification on our requirements regarding acknowledgement.

Foundation platforms and distribution channels

We are keen to disseminate your work to reach wider audiences. We can feature news items, blogs, short videos, media releases and information about events on our website,

with appropriate links and assist with distribution through our networks. Please contact [Jessica Bridges](#) to discuss further.

We are seeking to include short videos on our website about the work we support. Please send us video clips or short films where you have them.

Where available, please also send us good quality digital images of your work for possible publication on our website, in our Annual Review, or in related publicity. Please ensure that all copyrights have been cleared and provide appropriate captions and credit lines. If supplying photographs of children under 18, a signed consent must be obtained from parents or guardians.

Channels:

[CGF (UK Branch) YouTube](#)

[@CGF_UK Twitter](#)