



✦ The UK Branch's new offices in Hoxton Square, London. Designed by Thais and Klan Architects.

Alex Delfane

### 2009 – Year of change and challenge

The political and economic situation remains volatile in the UK with interest in the third sector about what a change of government could mean in policy terms but also the potentially more significant development – whichever party

forms the government – of large cuts in public expenditure in the future. This uncertainty was accompanied by necessary financial restraint agreed by Trustees following the reduction in investment income which resulted from the economic downturn. But the review we undertook of the UK Branch’s activities in 2008, and implemented in 2009, prepared us well and we decided to focus more on those areas identified as strategic priorities:

- › fulfilling potential – exploring, and helping address, the needs of the most vulnerable people in society, young people, and the increasingly large population of older people (and the relationship between them);
- › helping protect the environment; and
- › helping improve cultural understanding.

During the year, we completed a substantial refit of the property acquired for the UK Branch in Hoxton Square and moved into the still deprived but regenerating area of Shoreditch. Moving offices, while symbolic of our repositioning, was not what our strategic review had been about. The review had revealed that we needed to make four key changes in the direction of the UK Branch:

- › to achieve greater impact by working to these more focused, and purposeful aims and objectives;
- › to develop a greater international focus as part of an influential European Foundation, renewing and strengthening our relationships with colleagues at the Foundation’s headquarters in Lisbon and at the Calouste Gulbenkian Cultural Centre in Paris;
- › to work in a more connected and involving way with our partners, grantees and neighbours, giving a smaller number of larger grants and following these through more systematically;
- › to re-emphasise the Foundation’s long-standing – and often influential – support for innovation.

Helping ensure that we are a catalyst for innovative practice remains a continuing feature of our work across our three strategic aims. Though becoming more proactive in the selection of organisations we support, we retain an open application fund for unsolicited ideas. The fund is important to us because it ensures that we do not reject potentially innovative ideas simply because they do not fit within our three strands of work or remain blind

	Amounts in euros
Personnel costs	745 173
Operating costs	589 663
Subsidies and grants	2 561 856
Departmental activities	115 795
<b>Total</b>	<b>4 012 487</b>
Receipts	38 693

to work undertaken by organisations of which we were previously unaware. But we have been disappointed by the quality of the applications and we tended to support projects that fitted our primary aims or addressed generic issues in the voluntary sector such as leadership and sector-wide learning.

## **Maximising and measuring impact**

Now that our broad strategy is in place, the dominant theme going forward is on how best to maximise the impact of our work. We renewed our emphasis on social, cultural and educational change; we are about making a lasting difference and one which reaches beyond the locality of a particular project – and beyond the period of our necessarily limited support. To achieve this, we need to put in place strategies and deploy a range of tools throughout the duration of a project or programme. These include:

- › clarifying more explicitly the problem we are trying to address and the gap we are trying to fill;
- › developing partnerships, and nurturing potential advocates, to give reach to messages emerging from our work;
- › capturing the wider learning – the what works – from our necessarily small interventions;
- › developing communication strategies at the outset of work;
- › thinking about, and building in, legacy including how best to replicate or scale-up ideas and to position other funders to support this;
- › agreeing at the outset an indication of what outcomes we hope to achieve.

Measuring outcomes is an increasingly important theme both for charitable foundations and the third sector as a whole – all the more so in the era of certain decreases in government spending and the need to demonstrate value – and it underlines the timeliness of work we have commissioned from DEMOS on the capacity of the third sector to measure performance.

## **The international dimension**

Central to our change in direction was the belief that we should strengthen our relationship with our colleagues in Lisbon while at the same time moving beyond a solely Anglo-Portuguese axis to address issues of wider, common concern – the need for greater cultural understanding, to develop transnational learning as to how excluded groups and individuals can best fulfil their potential, and to protect our threatened environment – helping to bolster the Foundation's reputation as a serious player in European philanthropy.

We began work on a series of joint projects with Lisbon and supported bids to the new fund established by Trustees for projects that are innovative, international, involving of a leading partner, and cross-functional. For example, we are working in collaboration with our colleagues in Lisbon on a range of transnational projects that promote intergenerational connections, specifically for the benefit of older people – such as “Action for Age” with the RSA and ExperimentaDesign, the launch of ‘Inter-generation-all’ pilot projects in partnership with Thinkpublic, and the support of the European Mapping for Intergenerational Learning (EMIL) network.

We also began to participate in wider networks, beyond the UK and Ireland, including my own involvement in the European Foundation Centre's network-building committee, through our membership of EUCLID, the umbrella body for chief executives of third sector organisations in Europe, and also through hosting the Woburn Place Collaborative meeting which looked specifically at where and how foundations can work internationally to contribute to their aims.

## Involving partners and colleagues

The adoption of a new approach to grant-making means developing new ways of engaging with our partners – whether grant recipients, other foundations and third sector organisation or, indeed, our neighbours.

Hoxton Square is an exciting place to be in 2010 – on the edge of the City of London and part of the revival of the East End. The architecture of the building – open, lit by natural light, contemporary in its design and drawing inspiration from our headquarters in Lisbon – reflects our ambition to build the UK Branch as outward-looking, international, and committed to social, educational and cultural change. In September, we were delighted to open our new home to our neighbours in Hoxton, to host a public cultural evening in the square, and to welcome our Trustees, many travelling from Lisbon, the following day for the formal opening of the building.

2009 was a year of considerable change for us. I want to acknowledge the professionalism of my colleagues who have demonstrated continued loyalty and passion, and considerable flexibility, in adjusting to new working practices and the reconfiguration of roles, accompanied by the departure of some long-serving colleagues and a necessary reduction in our administrative costs.



❖ Martin Essayan at the opening of the UK Branch's new premises.

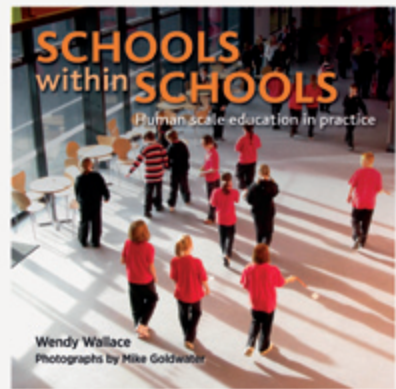


Alex Deifane

❖ The UK Branch's new offices in Hoxton Square, London. Designed by Thais and Klan Architects.



James Austin



- ✦ The new school in Washington, Tyne and Wear, designed in keeping with the project and organisational structure based on the philosophy of “Human Scale Schools”.

## Fulfilling potential

“To help build relationships and reduce social exclusion in order to assist individuals, families and communities to fulfil their potential and contribute to society, particularly focusing on: the young in school, relationships between young and old, migrant communities, and those most at risk of dropping out of society...”

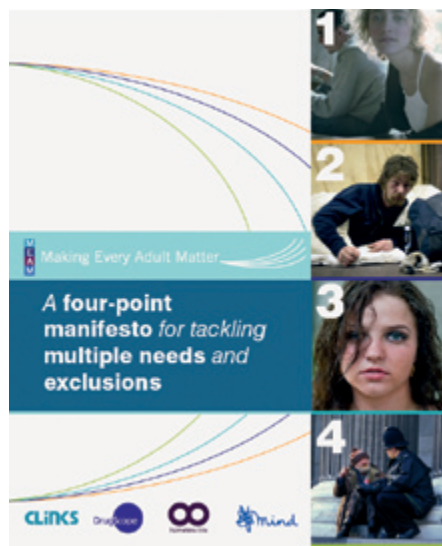
## “Human Scale Schools”

In 2006 the UK Branch established the Human Scale Schools project, in collaboration with the educational charity Human Scale Education and with additional support from the Paul Hamlyn and Esmée Fairbairn Foundations. The project’s aim was to help large secondary schools adopt different kinds of human scale practices. Between 2006 and 2009, the final year of the programme, we have: supported almost 40 schools; published a book of case studies of funded schools – *Schools within Schools: Human Scale Education in Practice*, and a number of Occasional Papers, commissioned a television series for Teachers TV; taken large numbers of teachers to schools in both the US and Scandinavia; organised two national conferences and established an e-bulletin for the network of schools. The case for a more human scale approach to secondary education was widely discussed in the media, and has been made to all three political parties in the UK ahead of the election. From 2010, this work will be taken forward by the charity Human Scale Education, which is receiving a major grant from the UK Branch to enable it to “scale up” to meet this challenge.

## Making every adult matter

There are many whose experiences are impaired by the interrelated problems of homelessness, mental ill-health, substance misuse and periods spent in detention. The UK Branch is supporting “Making Every Adult Matter” (MEAM), a groundbreaking cross-sector coalition of four national membership charities – Clinks, DrugScope, Homeless Link and Mind – focused on policy and practice change for people with multiple needs and exclusions

(£56,000, € 68,880). In 2009, the coalition launched a four-point manifesto calling on the next UK government to define the group; accept the social and economic case for action; develop a national policy framework to support local action around “joined up” services for this group; and measure national progress. MEAM hopes that the government will lay out its thinking in a multiple needs Green Paper early in the next Parliament.



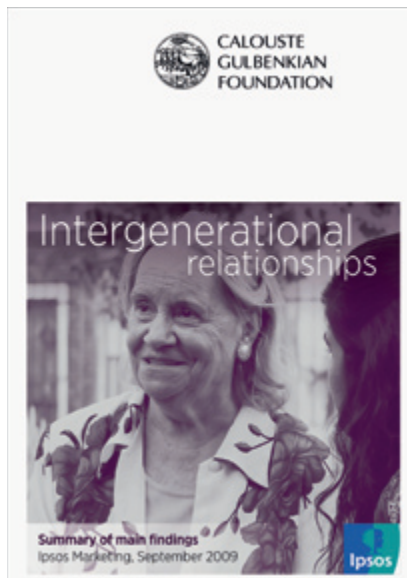
### Older people

Supporting and foreseeing the contributions individuals make to their communities requires a long-term vision of how demographic change alters day-to-day lives. With this in mind, in 2008, the Foundation began a focused programme of work on ageing and, in 2009, this was developed with a range of local, national and transnational projects.

✚ Making every adult matter. Manifesto for tackling multiple needs and exclusions.

We recognise that a positive experience of ageing will not only rely on economic security but also on wellbeing and a sense of connection to others. As such, ending loneliness in older age remains a priority, and, in 2009, we started to investigate issues around loneliness and isolation with a view to supporting and participating in the development of a coalition to combat the problem. With the ever increasing reliance we have on new technologies and the potential they have for connecting those at a distance, we felt exploring the use of ICT to be key to securing inclusion of older people both now and in the future. Additionally, we welcomed the launch of an in-depth report by the Institute for Public Policy and Research (IPPR), *The Politics of Ageing* which focused on wellbeing and the implications for policy and supported a further, similar, study by the Centre for Social Justice.

With the Gulbenkian Programme for Human Development in Lisbon, the UK Branch continued to explore new approaches to intergenerational practice with projects benefiting from the use of design principles to build the service around the user, based on a scoping report conducted by the Oxford Institute of Ageing. One such initiative launched a range of pilot projects with the support of the UK-based service design agency Thinkpublic, which will “co-design” project plans with users and other stakeholders. Another saw RSA team up with ExperimentaDesign



- ✦ Call for the presentation of innovative intergenerational projects. Co-initiative of the Foundation in London and Lisbon in association with the Thinkpublic design agency.

in Lisbon on “Action for Age” (£42,000, € 51,660). This project challenged design students to invent service solutions for older people in the UK and Portugal while comparing different cultural approaches and settings. We also launched a four-year initiative supporting the European Mapping for Intergenerational Learning (EMIL) network which will ensure best practice is replicated and new projects formed across European borders. The results of all this work will be shared as part of the EU Year for Intergenerational Solidarity in 2012.

## Environment

“To support imaginative interventions that contribute towards the protection of the environment, and explore how environmental change affects the way we live.”

The UK Branch is developing its thinking under this theme. The breadth of the subject is immense and, in 2009, we embarked on a process of research and consultation to define the areas in which our funding can effect beneficial change in the lives of individuals and communities. Over the year, we have sought to support projects that encourage a public awareness of, and involvement with, the natural environment, with a view to influencing local and national policy and practice.

## Public engagement

A major project with the Natural History Museum (NHM) promotes the theme of citizen-orientated science. In partnership with the Woodland Trust, the NHM is launching in 2010 a nationwide tree survey. The aim is to encourage people to become actively engaged in environmental monitoring in a way that both contributes to the advance of scientific knowledge and gives the public a route to inform



NVA

✦ Woodland in Kilmahew, Scotland. An nva regeneration project involving socially underprivileged young people.

policy decisions (£90,000, € 110,700). In a mapping initiative for young people, General Public Agency (GPA) has employed an innovative model from the 1940s – *The School Looks Around* (1948) – which encouraged schoolchildren to survey, protect and influence their local area. GPA’s pilot project for two secondary schools will create contemporary records of changing urban and rural environments in the UK (£30,000, € 36,900). Glasgow-based NVA are involving school-leavers from disadvantaged areas in a major regeneration project to transform a 100-acre derelict woodland site at Kilmahew



Jyll Bradley

✦ The New Plant Hunters, Santa Cruz, Galapagos Islands, 2008.



in the Firth of Clyde, setting up a model that can be replicated by other organisations (£20,000, € 24,600).

Two new research projects by Botanic Gardens International (BGCI) – investigating social inclusion policies within botanic gardens and the viability of establishing Islamic gardens – seek to involve and inspire diverse local communities in matters of plant conservation and biodiversity (£44,850, € 55,166; £32,775, € 40,313). The research findings will be debated at the 4<sup>th</sup> Global Botanic Garden Congress in June 2010.

## Art and biodiversity

Drawing on our experience of facilitating arts and science collaboration we have initiated two experimental projects. In a cross-cultural pilot project inspired by International Year of Biodiversity 2010, artists' residencies have been established at the Botanic Garden and Harcourt Arboretum, University of Oxford, in the UK, and at the Foundation's Gulbenkian Institute of Science in Portugal. The aim is that these collaborations between artists – Portuguese artist Gabriela Albergaria in Oxford and British artist Rob Kessler in Lisbon – and scientists will enable both sides to take new perspectives on their own work and make the processes of each more accessible to the public.

The "Gulbenkian Galapagos Artists' Residency" programme, established in partnership with the Galapagos Conservation Trust in 2007, involves artists' unique perceptiveness to highlight the challenges, local and global, faced by sites of conservation and natural heritage. Artists from a variety of disciplines visit the Galapagos, touring the islands with a naturalist, undertaking research with scientists, and engaging with local people (£100,000, € 123,000). An exhibition of their work will take place in 2011 in the UK and subsequently in Portugal.

## Climate change

The UK Branch has funded a number of initiatives to build grassroots support for policies to promote behaviour change and the transition to a low-carbon economy. In a large-scale scoping study, Green Alliance is investigating the extent to which third sector organisations not directly concerned with the environment are nevertheless engaging with climate change issues and acting as agents for change (£60,000, € 73,800). The Institute for Public Policy and Research (IPPR) is developing a new strategy for creating 'green collar' jobs in UK cities, mobilising grassroots organisations, including trade unions and the third sector, to effect change, an approach that has been successfully pioneered in the United States (£45,000, € 55,350).

In the run-up to the 15<sup>th</sup> Conference of the Parties (COP 15) in Copenhagen in December 2009, 100 British citizens debated and voted on issues of climate change policy at an event facilitated



✦ Debate in the United Kingdom in favour of expanding world discussion about climate change, promoted by Involve. Participants from all over the world were involved in similar debates.

by the Participation Organisation Involve. On the same day, groups in 38 countries from Nigeria to Bangladesh, the United States to New Zealand, came together in a worldwide public consultation exercise. Their consensus views on policy and action were subsequently fed into the discussions at COP 15 (£15,000, € 18,450).

## Cultural understanding

“To help change people’s perception of each other by providing opportunities for improving understanding through culture and between cultures...”

## Through culture

The term culture is broad and as a Foundation based in a European country with a global diaspora, we recognise the fact that encounters in public life are increasingly viewed from an international perspective. Imagining how different people live, work, think, feel – whether the gap is geographical, economic, cultural or age-related – has always inspired unique forms of expression through the arts. In 2009, we gave final support, from a longer-term commitment,

Tate Photography



❖ Altermodern: Tate Triennial, 2009. Gallery exhibiting works by Mike Nelson and David Noonan, courtesy of the artists.

to two high-profile international visual arts festivals – Tate Triennial, where Gulbenkian Curator Nicolas Bourriard explored the idea of “Altermodern”, the global, the diverse, the instantaneous; and Liverpool Biennial, where we have supported a series of arresting new public art commissions from European artists (£100,000, € 123,000).

Although all artists work internationally, we believe that Portuguese contemporary art is still “the best-kept secret in Europe”. The UK Branch is therefore implementing a three-year visual arts strategy which aims to highlight work which should be much more widely known. In the first year we were very pleased to support an exhibition of the work of Helena Almeida commissioned by Kettle’s Yard in Cambridge and the John Hansard Gallery in Southampton (£30,500, € 37,515). The Foundling Museum in London commissioned, alongside Tracey Emin and Mat Collishaw, Portugal’s best-known painter, Paula Rego, whose disturbing images so appropriately suit the troubling history of the original Foundling Hospital (£25,000, € 30,750). And the Ikon Gallery in Birmingham hosted the UK debut of younger artists João Maria Gusmão



Courtesy of the artist and Marlborough Fine Art



✦ Paula Rego. *Oratório*, 2008-2009, Mat Collishaw, Tracey Emin & Paula Rego, Foundling, Foundling Museum, London.

and Pedro Paiva, who represented Portugal at the Venice Biennale 2009 (£18,500, € 22,755). We have on display at our Hoxton Square building the work of Paulo Catrica, Edgar Martins and Rita Soromenho, Portuguese artists resident in the UK. The first of three tours for British curators to Portuguese galleries and studios also took place in 2009, with a view to their establishing partnerships and gaining ideas for possible shows, collaborations or residencies (£15,000, € 18,450); this is an important way of working, reflecting the fact that we do not organise our own exhibitions but rather have to influence the programming decisions of public galleries. A permanent archive of contemporary Portuguese art is also planned at Tate Modern in London.



✦ “(M)Other Tongues”, a creative pilot workshop for bilingual (Portuguese-English) students from Norwood School, in South London, at the Arvon Foundation in Yorkshire.

In 2010, the UK Branch is introducing a new theme promoting literature in translation, primarily but not exclusively Lusophone. The UK has a poor reputation compared with other European countries for reading translated literature and we believe the wider availability of foreign writing, including for young people, will help broaden understanding of different cultures. We supported the Arvon Foundation’s pilot project “(M)Other Tongues”, a workshop to encourage second and third generation young people from UK Portuguese communities to develop their flair for writing in Portuguese as well as their creative skills in English. The triennial Calouste Gulbenkian Prize for translation from the Portuguese was won in 2009 by Peter Bush for his translation of *Equator* by Miguel Sousa Tavares (Bloomsbury).

## Between cultures

Escalating migration is one of the greatest and most profound challenges of our time. In addition to contributing to the organisation of the British Council’s Network Effect conference on migration – “A Worldview on Europe”, we have commissioned a report in the UK to identify issues of cultural misunderstanding caused by cross-global migration, and to pinpoint key areas where the Foundation can act and add value in the future (£20,000, € 24,600).

Improving understanding between cultures includes the degree to which customs and laws, as well as people, are sympathetic to the needs of immigrants or incoming cultures. In Northern Ireland, this issue has been thrown into sharp relief by the arrival of relatively large numbers of refugee and asylum-seeking children. In 2009, the National Children’s Bureau Northern Ireland was funded to develop a strategic response to the needs of such children across the public and voluntary sectors (£60,000, € 73,800).

Cultural isolation can also be experienced *within* a well-established culture. For example, young Muslims who need guidance on aspects of Islamic teaching may feel isolated from

the more traditional beliefs of their families. A major grant to the Young Foundation allowed for the further development of the innovative Maslaha project, a unique web-based resource ([www.maslaha.org](http://www.maslaha.org)) that addresses some of the central questions that affect British Muslims, as well as providing clear and accessible information for non-Muslims (£60,000, € 73,800).

## Innovation

“To support exceptional ideas and unusual partnerships that might not otherwise come together...”

Initiated in 2009, the innovation fund – the only funding stream open to general applications – has helped us to remain alert to, and engaged with, the sectors in which we work, where there is much greater experience than we have internally, and to retain an element of reactivity in our otherwise much more proactive operation. We use this fund in the main to identify new ways of supporting our three main strategic aims whilst recognising the need to support generic interventions that assist the development of greater capacity and effectiveness in the third sector.

## Policy and practice

At this time of financial uncertainty, the public and private sectors are looking for new approaches to social and economic questions and to political engagement. Third sector organisations have a key opportunity to influence public policy. Concerned with these issues, the UK Branch, in consultation with key organisations, has commissioned two potentially influential pieces of research. A report from the Association of Chief Executives of Voluntary Organisations (ACEVO) will highlight how best to capture and translate innovative practices into policy, which in turn will help voluntary organisations to contribute to the development of social policy (£30,000, € 36,900). Secondly, the think tank Demos will review the capacity of the third sector to measure and demonstrate social value (£15,000, € 18,450).



GMP

✦ Grassmarket Project (gmp) workshop for young people monitored by professional artists.

## Social innovation

In selecting our funding partners and projects we look for qualities we value. The work of Grassmarket Project (GMP), for example, is cross-sectoral and highly innovative, it is international and independent in approach yet rooted in partnership, and is committed to securing beneficial change in the lives of the most disadvantaged

in society. In order to provide a model for other organisations to replicate its award-winning theatre and film-production work, GMP are initiating a three-year study of a project with immigrant youth in London to examine and document the key mechanisms of its unique method (£25,000, € 30,750).

Co-operation Ireland, the leading peace-building charity in Northern Ireland and the Republic of Ireland, also works in partnership to achieve its goals. The UK Branch is supporting the scoping and development of a virtual project – an island in Second Life where young people from divided communities within Northern Ireland can meet virtually and collaborate in a shared mission (£30,000, € 36,900).

### **Social entrepreneurs**

The UK Branch has always been prepared to back visionary people as well as projects and from our earliest days we have sought to effect change through the activities of talented individuals. We continued with this tradition in 2009, funding two Gulbenkian Fellowships in the Clore Duffield Social Leadership Programme, an initiative to develop and encourage emerging talent in the third sector (£45,000, € 55,350). We also supported Unltd's Ageing Challenge Fellowships Programme – to find, fund and provide practical, personal, leadership and project development support to individuals with entrepreneurial solutions to the issues faced by an ageing society – an innovative approach that fits with our core aims (£45,000, € 55,350).

### **Sharing ideas**

As part of a European Foundation based in Lisbon, Paris and London we are especially able to benefit from the sharing of ideas and practice with partner organisations in Europe and the wider world, and to participate in international discussion forums.



✚ The Summer School on Social Innovation held in 2009 by six at the Gulbenkian Foundation's headquarters in Lisbon.

The Summer School on Social Innovation held by the SIX network, which we support, was in 2009 hosted at the Foundation's headquarters in Lisbon. SIX, coordinated by the Young Foundation, is a network of 15 core partners and some 250 associate organisations worldwide set up to enhance current networks across the field of social innovation. The Summer School aims to advance the sharing of knowledge and experience between its participants thereby improving the impact of their future activities. Similarly, the British Council Network Effect conference on migration – "A Worldview on Europe" – also held at the Foundation in Lisbon, in January 2009, brought together practitioners in the field of migration to share best practice and make recommendations for a grassroots approach to migration and community integration.