Philanthropists working in systems

00 Contents

01 Introduction

The Funders Retreat was an opportunity to provide a space for senior members of the funding community to talk through and reflect upon the value of a systems approach to their organisations and their practice. Funders regularly speak about the complexity of the social issues that they seek to address, and they acknowledge that it is easier to recognise that something is complex but much harder to know how to act. Systems approaches have emerged over several decades as a way of helping to understand complexity and as a means of addressing some of the real-world problems that funders and social sector leaders grapple with on a day-to-day basis.

The two-day event brought together forty-three individual funders from thirty-two foundations working across the UK and Europe with a very diverse spread of interests and make-up. Sitting alongside each other were large national and international funders and smaller hyper-local ones; endowed institutions and operational funders; multi-interest funders and issue-specific funders.

"We needed nudging beyond the desire for certainty

Why a convening of funders?

Lankelly Chase has been on a six-year journey of learning, change and realisation about its role as an actor within the systems it's focused on. It has inadvertently found itself being described as the Systems Change Foundation. This, Lankelly believes, is wrong because funders work within a system and a grant is an intervention in that system, so all funders are systems changers.

"Your work is in a system, you are part of the system, and you affect the system."

The expectation was that, by convening funders as a 'collective' ecosystem and providing opportunities to discuss philanthropy through a systemic lens, there would be opportunities to:

- Name the systems impact already created
- Understand individual and collective positions in relation to systems
- Collaborate as a system

01 Introduction

"We are all system actors"

Why now?

The relationship between people and state is at huge toxic risk. We are in unprecedented and dangerous territory as a country and as a planet. There have been major shifts in power, accountability, human connection, trust and sustainability that has resulted in polarisation, protectionism and populism, etc. There's also a dizzying sense that everything is connected to everything else.

Foundations are increasingly stating that they need to act differently and in collaboration. There is a strong sense that we need to step up and do so collectively. There's a strong sense of if not us then who?

Yet we feel overwhelmed by the enormity and uncertainty of what faces us. Yes, within civil society we are viewed as holding power, but in the face of the challenges we feel like minnows pulled every which way by currents we can't control, questioning whether we are powerful enough players to make radical change within our systems.

There's a great, urgent need to be develop a healthy system.

A step forward?

The retreat was about creating a safe space to think through the interconnectivity between the issues and within our systems. What could this collective of foundations amount to? What systems do we represent, how do we avoid being part of the problem? And, how do we work differently?

02 Theory: 3 Schools of System Change
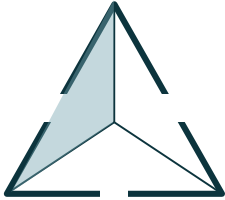
Cybernetics
Systems Thinking

Cybernetics' **key focus is** using tools for mapping. This mapping helps understand causal loops and depersonalised dynamics within a system. It also looks to understand the impact of an individual's mental models **in order to** map networks of relationships and therefore uncover multiple causes of key issues.

Complex Adaptive Systems
Living Systems

Adaptive Systems' **key focus is** looking at a system's boundaries and the maintenance of identity. It also focuses on relationships and flows of information between people. It uses dialogic approaches **in order to** to change strategy development through building shared meaning and identity in disparate groups.
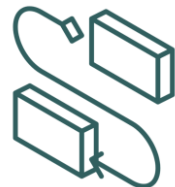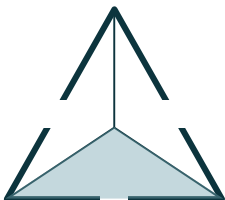
Complexity
Complex Responsive Processes

Complexity's **key focus is** looking at the psychology of communication, power dynamics and conflict. It studies the paradoxical nature of organising: inclusion/exclusion, competition/cooperation or the 'enabling constraints'. The approach is about experimentation and observation **in order to** shift stuck conversations in organisations and develop practical action in complex situations.

The following ensions exist within the three schools of systems change. A key take-away was that working systemically requires us to work with these tensions rather setting them up as polarities.

Components ←	**Networks** →	**Interactions**
Static ←	**Patterns** →	**Dynamic**
Bottom Up ←	**Emergence** →	**Nested**
Linear ←	**Phase Transitions** →	**Non-linear**
Objective ←	**Frames** →	**Subjective**
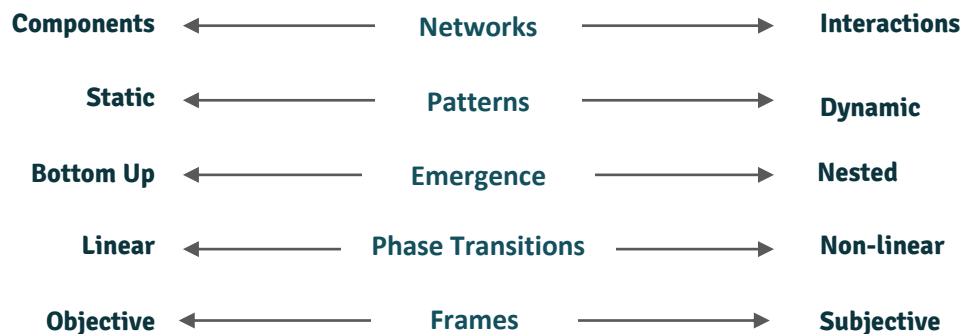
02 Theory: The OPSI

We heard from Piret Tonurist, Lead on Systems Thinking and Innovation Measurement at the Observatory of Public Sector Innovation. On this page is a snippet of theory from her presentation, including approaches to systemic innovation and a selection of tactics for system change.

DIRECTED
Shaping/Top Down

CERTAINTY
Exploiting/Incremental

Mission-oriented
innovation

Sustaining Change

Transformative Change

UNCERTAINTY
Exploring/Radical

Enhancement-oriented
innovation

Anticipatory
innovation

Optimising Change

Disruptive Change

Adaptive
innovation

UNDIRECTED
Responding/Top Down
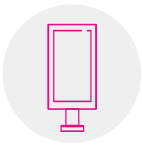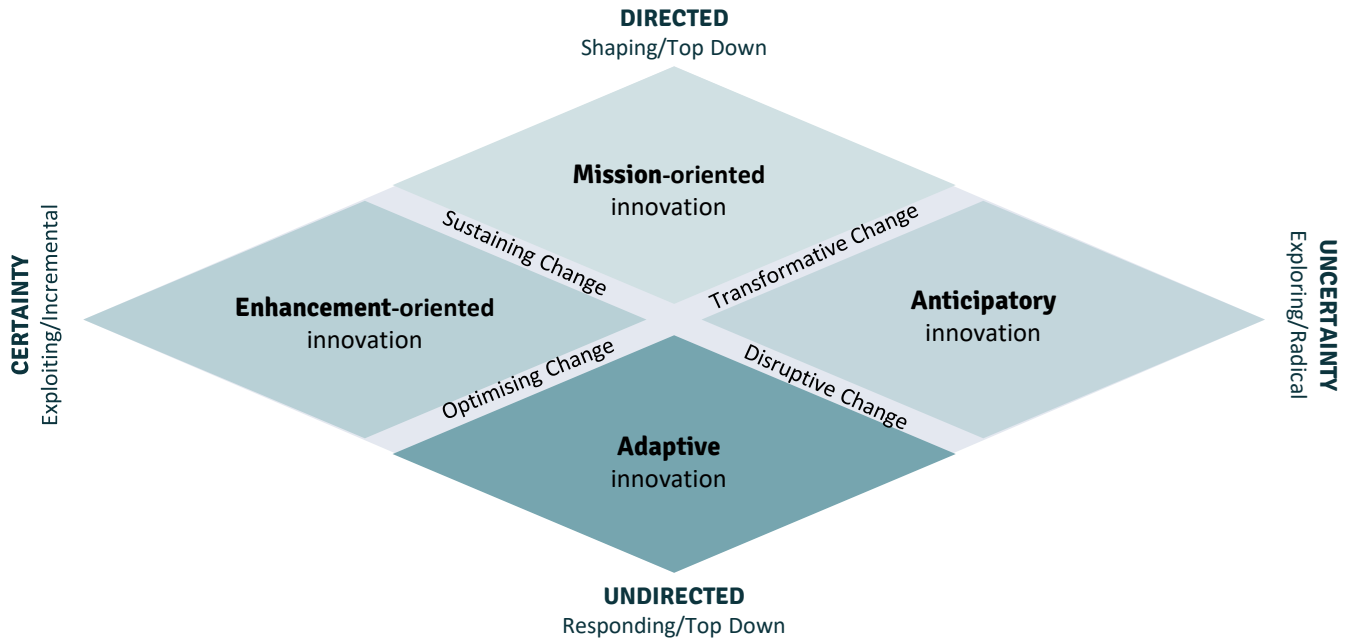
FRAMING

Framing the issue based on the outcome/purpose (public value), not on existing system structures

PEOPLE

Combining a diverse set of people:"If you know everyone in the room: you will fail"

PLACE

Creating the neutral space to deliberate and set back from the everyday system

CONNECTING

Connecting to all stakeholders, both to inform the process and to form advocacy coalitions

DESIGNING

Based on the analysis, designing solutions that may have systemic effects

EXPERIMENTING

Reducing uncertainty by experimenting with smaller scales, with different solutions and having clear action plans

"Love the problem, not the solution."

Piret Tõnurist

02 Theory: OPSI

Q
How do we attend to power dynamics and privilege?

Q What do senior policy makers engage with most, or find most difficult?

You would think that systems change lies with politicians, as they are the ones who can align their actions to their promises of nationwide change. We know that this is not the case. Governments are there to respond to and engage with complex problems. There's a strong disconnect between politicians and implementation. Good ideas are not enough. It's the implementation that makes the difference.

Governments are limited, they cannot create change by themselves, they need to stretch further than their hands can reach and collaborate with other players in the system.

Q There is a difference in how issues are framed. A person with a chronic disease needs the support right now, and yet the clinicians and policies are moving toward preventative solutions that aim to see change in 10 to 15 years. There is a gulf, how do we avoid this feeling of a very top down system change?

We need to engage with contextual complexity. Does this mean it is top down? The 'top' needs to create the space and conditions to then involve those in the midst of the complexity in the best way possible. Otherwise, we risk expert bias where experts or those in power tend to simplify the problem in order to act.

Q The turnover of politicians and political cycles means that agendas and goals change rapidly. Is systems change always a long term investment, or can it happen within a political cycle?

When we try to solve things, especially when we try to solve things quickly, we create new problems. Systems change in government takes, on average, about 7 years and political cycles influence opinions on the ground. People change responses and behaviours with implementation. There is need for transformation where stories transcend agenda.

Q How do philanthropists fit into this?

Are grant-givers activists with money? Or networks of partnerships and coalitions? Or both?

Q What are the leadership characteristics?

There is a need to move fluidly from mission-oriented to adaptive, for leaders who have charisma and the ability to create room, space and conditions for change. This type of persona supports the *weaving through structures* and has the ability to bring others along. But, as we know, you can't teach charisma. Transformative leadership qualities might include being motivated by results and outcomes, giving autonomy to others, coming up with solutions that aren't predefined, motivating and mobilising networks, looking beyond self-serving glory, and t creating and growing the right teams.

03 Hearing from our Colleagues

The following examples reflect presentations from three colleagues who shared their experiences of systemic change within their organisations.

Edge Fund

What do we do?

Edge Fund registered as a Community Interest Company so that we can fund all types of social change. We give out up to £5k for grassroots groups in the UK and Ireland that are led by people affected by the issues. The groups we support challenge injustice and oppression in the current economic, political and cultural systems. Our funding uses participatory grant making, and our two part-time staff focus mainly on outreach. Our mission is to support grassroots community activism, and promote systemic alternatives to traditional philanthropic practices.

How do we do it?

We have a non-hierarchical structure with around 120 members. Our members and previous grantees contribute to our process via reviewing proposals in our participatory funding model. The process we use models new structures of decision-making in order to create the space for solidarity, not competition, and build the conditions for lasting change. Our process, where shortlisted groups and previous grantees review each others' proposals, encourages learning between community groups.

Why do we do it?

Philanthropy is a result of inequality. Many grantmaking models replicate power and privilege imbalances. Those who set the agenda are most often the least affected. So: who sets the agenda for system change?

What are we seeking to explore?

We integrate our politics in our policies. As members of the any community, including the philanthropic community, we must continually ask ourselves 'What injustice am I standing up for? How am I using my privilege?'"

"
How am I using my privilege, and what am I standing up for?

Rose Longhurst

03 Hearing from our Colleagues

Friends Provident Foundation

What do we do?

We are a foundation for a just, sustainable economy. From having a systemic view on economy, we have noticed lots of initiatives are about tackling the symptoms, but we strive to get to the heart of the problem - which, in this case, is the economy. We have 7 staff and a £35m endowment from which, in the past, we have funded: Rethinking economies, Core Economics, Share Action, IPPR economic justice, Client Earth, Women's Budget Group, and other community energy groups.

How do we do it?

Our foundation has three key roles: giving money, convening people to build movements and investing in the marketplace with our endowment. To do this well, we hold on to four key qualities:

1. A higher risk, messy, venture capital approach
2. A duty to fund seemingly stupid things and take risks
3. Mapped system; who are we funding? Who's missing? Who else needs to be there?
4. We work across the whole system

Our culture is fuelled by humility and flexibility and we back this up with open recruitment and randomised control trials using a 'what works' model.

Why do we do it?

There is a need for new narratives, we are trying to ask: What is the new story of economy?

What are we seeking to explore?

We strive to see the interconnections between the systems, including those we fund, to inform policy work because we strongly recognise that we are part of the systems. Foundations are NGOs with lots of money, but will the spray and pray mentality change over time? To check ourselves, our theory of change is published online and recognises that:

- Affecting the system is hard
- Neoliberal economies
- Ideas and paradigms are just as important, as they cascade into practice
- The role of people's movement building is understated.

> ## "If you're seduced by the complexity of complexity… you lose sight of the day job."

Hetan Shah

03 Hearing from our Colleagues

European Cultural Foundation

What do we do?

We explore how culture in its widest sense - not just art and creativity - can accelerate social change in Europe.

How do we do it?

Our social mission is to be 'open, democratic and inclusive'. The European Cultural Foundation is a member of the Edge Funders Alliance, which is a collective learning safe space where we can be critical of our own foundations, collaborate and play. Edge Funders Alliance hosts The Global Engagement Lab, which offers a process of co-learning, collaboration, wisdom-sharing and practice building in order to grow systemic alternatives. Edge Funders also initiated the Cities of Change Funders Collaborative where we can learn from each other, seek to fund systemic initiatives and support the rise of a trans-local, progressive, citizen-led movements. We know political participation is key to building a feminised economy and democracy.

Why do we do it?

There is a crisis in democracy. There is fragmentation between communities along with growing nationalist voices. We have come to a mentality of extractivism and consumerism, of power over people, not with people and power over nature. There is a need to understand and deconstruct the root causes of this democratic crisis. The crises are deeply connected via the economy, ecology, environment and sociology and so there is a need for collaboration and cross sectoral work to be done in order to to support the systemic movement. Working together across sectors represents alternatives to implementation and encourages bottom up engagements.

What are we seeking to explore?

We are seeking to explore a collaborative approach to focus on the systems, not the symptoms, of our societies. There is an opportunity to scale the systemic alternatives that are built through citizen-led projects, and this scaling of systemic initiatives must engage with governance and the sharing economy. We need to work together, complement our differences, and collectively develop the systemic alternatives to the current democratic crisis.
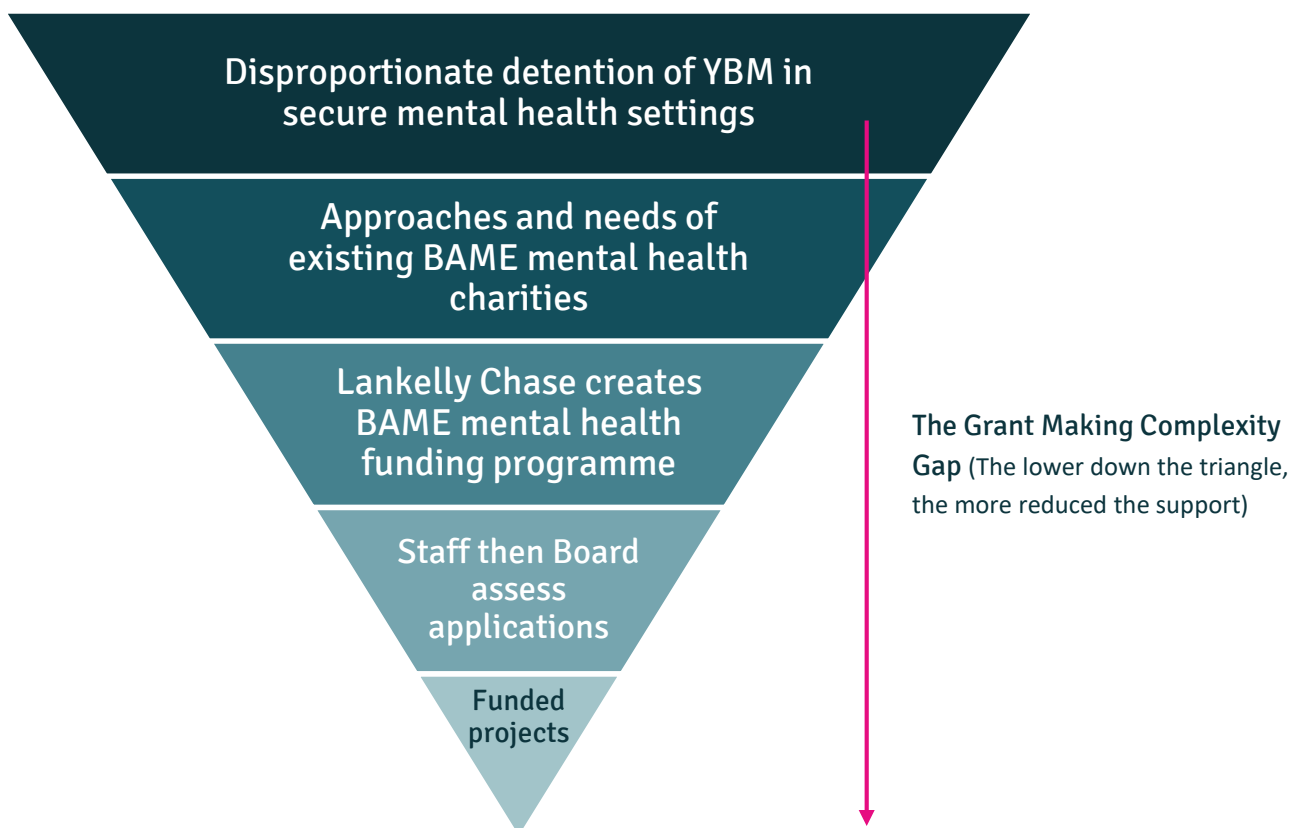
Let's make philanthropy humble again.

Vivian Paulissen

04 Journey of Lankelly Chase

Lankelly Chase shared their journey of systemic change, with illustratrations from their approach to ethnic inequality in mental health, and the creation of Black Thrive.
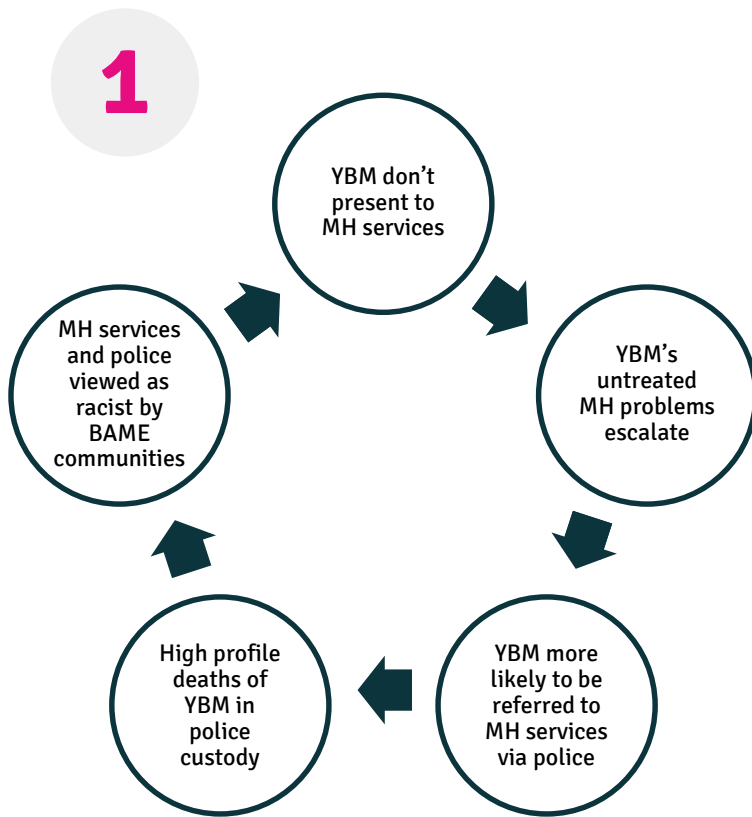
Black Thrive is a partnership-based, cross-sector approach to deliver system change. It is not intended to offer a specific, singular response to the inequalities existing in the experience by black communities. The response designed has focussed on creating a platform that engages all stakeholders, facilitates dialogue and leads to action in the many different places it will be required. Black Thrive will seek to address a number of systemic issues which have contributed to poor mental health outcomes for individuals from black communities to date.

"Lankelly Chase's focus is on severe and multiple disadvantage, by which we mean the intersection of social harms and the system dynamics that shape and exacerbate them. Each of these systems - the homeless system, the drug system, the mental health system - originated at a point in history, usually when the nation woke up to a particular harm, and they reflect the paradigms that existed at that time which were hardwired in legislation, infrastructure, and institutional mindset. These systems are designed to deal with the situation that existed at the time of conception – so we have systems that relate well to the 60s, the 30s, and the 1890s. In combination, this has led to the 'inverse care law', which states that people with the most problems perversely get the least care. A prime example of this is ethnic inequality in mental health.

Disproportionate detention of YBM in secure mental health settings

Approaches and needs of existing BAME mental health charities

Lankelly Chase creates BAME mental health funding programme

Staff then Board assess applications

Funded projects

The Grant Making Complexity Gap (The lower down the triangle, the more reduced the support)

Our grant making took an issue as complex as ethnic inequality in mental health, and whittled it down to a small number of grants to organisations that were barely surviving. We had to shift the model from grant making to change making. This journey was shaped by 6 realisations illustrated on the following pages.

04 Journey of Lankelly Chase

1

```
YBM don't present to MH services
  → YBM's untreated MH problems escalate
  → YBM more likely to be referred to MH services via police
  → High profile deaths of YBM in police custody
  → MH services and police viewed as racist by BAME communities
  → (back to start)
```

Systems are complex webs of interconnection

"Our old paradigm was grant funding projects that aimed to make Black and Minority Ethnic mental health better. It related to BME mental health as a 'thing' that could be targeted and improved. And yet it was already known that was a deeper dynamic at play, known as the 'circle of fear', which was generating the issue. We had found it easier to fund interventions in BME mental health ('the thing') than to take on the 'circle of fear' ('the dynamic').

What we did...

Lankelly Chase closed the Black and Minority Ethnic programme in order to spend more time digging deeper into the systemic problem itself."

" Target the dynamic, not the thing "

Everyone in a system holds different perspectives

In common with many, our starting point was to assume an identifiable system that was amenable to change, and that changing it would solve the problem. What we found was a huge range of perspectives on the nature, boundaries and purpose of the system. These perspectives are shaped by individual histories and cultural models and they cause stakeholders and experts to disagree with what we are actually seeing.

What we did...

We realised we needed to bring in new allies to gain new perspectives. We worked with Social Finance who immersed themselves in the conflicting perspectives of those involved in BME mental health in the London Borough of Lambeth. They shifted from a highly analytic, data-driven approach to holding large scale dialogues, bringing together experts, faith leaders and families with mediators/facilitators.

2
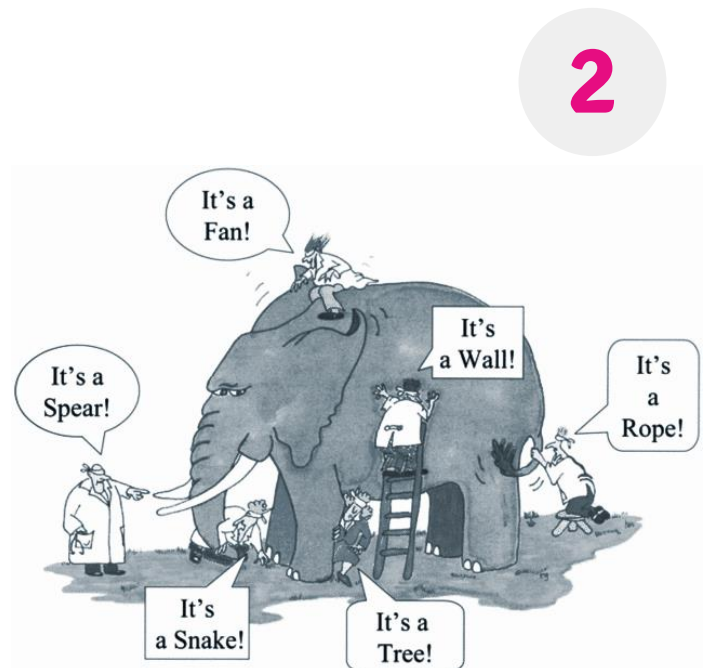
04 Journey of Lankelly Chase

3

Behaviours to
be aware of:

Blame

Defensiveness
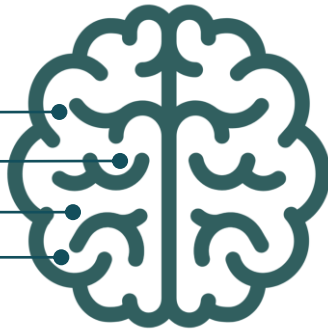
Stonewalling

Contempt

"
If you are working with systems, you are working with conflict
"

Everything and everyone exists in relationships, and these involve emotions

Human being find complexity stressful and therefore hold onto old paradigm identities which limit the potential to change. We found there was a need to encourage people to be honest, give up power, and think beyond their own script. And, therefore, emotions inevitably came up. Disturbance angers people, especially leaders and those in power, who are used to control. We have seen similarities between the four behavior toxins found in marriage counselling and behaviours within systems (see left). Building strategies without acknowledging these emotions are doomed to fail.

What we did...

In Lambeth the emphasis has been on creating human connection in contained and safe ways that recognised how everyone is triggered by this issue. More widely we have had to experiment with different forms of facilitation where emotions and conflict could be legitimised as inevitable and valuable, not suppressed as evidence that the process is going wrong.

Change emerges from the way whole systems behave not from the actions of any one part

Given systems are made up of interconnected variables, we knew that the outcomes we sought couldn't come from the actions of single organisations. However, we saw that some organisations were better than others at contending with complexity, and we identified qualities in those organisations that seemed to explain why. We then hypothesised that a system able to support these qualities would be one that modelled them itself.

What we did...

All of our work is now geared towards promoting, exploring and testing these system behaviours. The work in Lambeth led to a shared vision and a new infrastructure whose role is to build trust, build collaborative leadership, create the flow for learning through the system, and so on.

Perspective

Participation   Power
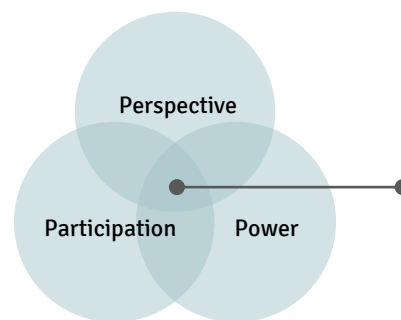
4

Lankelly Chase worked with partners and found these three key behaviours.

Perspective
- People view themselves as part of an interconnected whole
- People share a vision
- People are viewed as resourceful and bringing strengths

Power
- Power is shared and equality of voice actively promoted
- Decision-making is devolved
- Accountability is mutual

Participation
- Open, trusting relationships enable effective dialogue
- Leadership is collaborative and promoted at every level
- Feedback and collective learning drive adaptation

04 Journey of Lankelly Chase

5

Action Inquiry: A metaphor
"Imagine millions of drivers out on the roads, working together towards a common goal: to outsmart traffic and get everyone the best route to work and back, every day. "
Waze, a community-based traffic and navigation app.

The complexity of systems means you can't plan for the change you want to achieve

Most organisational infrastructure - programmes, performance frameworks, targets, budgets, evidence bases – posit a predictable future. When working with complexity, you have to take action without knowing where it will take you, and whether you are getting the right data back to determine success. This requires trust to be built between different actors.
What we did...
We took **an action inquiry** approach where we act in order to understand. Our board have oversight of this learning and use it to re-calibrate. The people we fund are our 'fellow inquirers' helping to generate the data that can navigate through the complexity. Black Thrive is effectively an action inquiry aiming for a bold outcome but without knowing how it will be achieved.

"Trust allows space for uncertainty"

If we want to change a system, we have to change ourselves

We are part of the systems we trying to change and some of our behaviours, culture and structures repeat the system problems we are trying to tackle. It would be a miracle if we were the only ones who were immune.
What we did...
We said we wanted trusting partnerships, but our partners relate to us as funder, so we had to invest heavily in nurturing those relationships. We said decision making should be delegated as close to the ground as possible, but we left the final funding decisions to our trustees, so it is now delegated to the Executive. We said power should be shared, but more senior members of the team had louder voices, so we introduced meeting methodologies that enabled different parts of the team to lead.

6

"You can't advocate for change, if you don't feel the pain of change yourself"

Friends Provident

"We can only imagine within our own limitations"

The following pages represent the collection of insights, conversation topics and deep explorations of possibilities that philanthropic system change could hold.

05 What big questions did we ask ourselves?

This page outline some of the key questions that came up over the course of two days and will continue to be explored as the conversations and relationships move forward.

What is the 'BIG' system?

How do we manage the gulf between our aspirational goals and our grinding realities and current processes?

Are we activists with money?

How do we recognise power dynamics?

How might we frame our intent and motivations for systems change?

How might we balance the big vision of long term systems change with today's demanding needs?

What level can we work at and how many aspects of complexity can an organisation deal with?

How might wider drivers of change, like technology, affect our systemic change?

How might we be attentive to failure?

What do we need to give up to make change?

Who is responsible for holding the risk?

What questions should we keep asking ourselves?

06 Our Inquiries

Can philanthropy create systemic social change?

If grantmaking needs a paradigm shift to create systemic social good in the world, there is a need to change approaches, behaviours, relationships and what we do with our money. This is especially relevant because grantmaking generally seeks to address the impact and imbalance of inequality and privilege. Arguably, the inevitable outcome of a healthy philanthropic system is that funders would not need to exist in the future.

Where is the thinking at right now?

Below is a model drawn out from the open space conversations over the two days. The model is an initial response to how we could begin to understand philanthropy as a potential catalyst for systemically driven social good. The model will change and evolve as thinking goes forward:

1 **The Bigger Systems** We are attentive to and understand how we, as a collective of philanthropists, sit within and across bigger systems, and also how these systems affect us and our mission.

2 **Ways of Working** As a collective, we will develop how we use our assets, develop our behaviours and skills, to create a radical paradigm shift within key systems such as the economy and poverty.

3 **Place based action inquiry** We will expand perspectives, practice what we preach and develop change with local innovative charities, whilst learning from their structures and approaches.

4 **Pooled influence** We will pool our learning, information and relationships from local places to affect a crucial element of national work with governments and corporations.

5 **A learning space** We will consistently hold a learning frame of mind and create the conditions for learning as we embark on a systemic approach, across all levels.
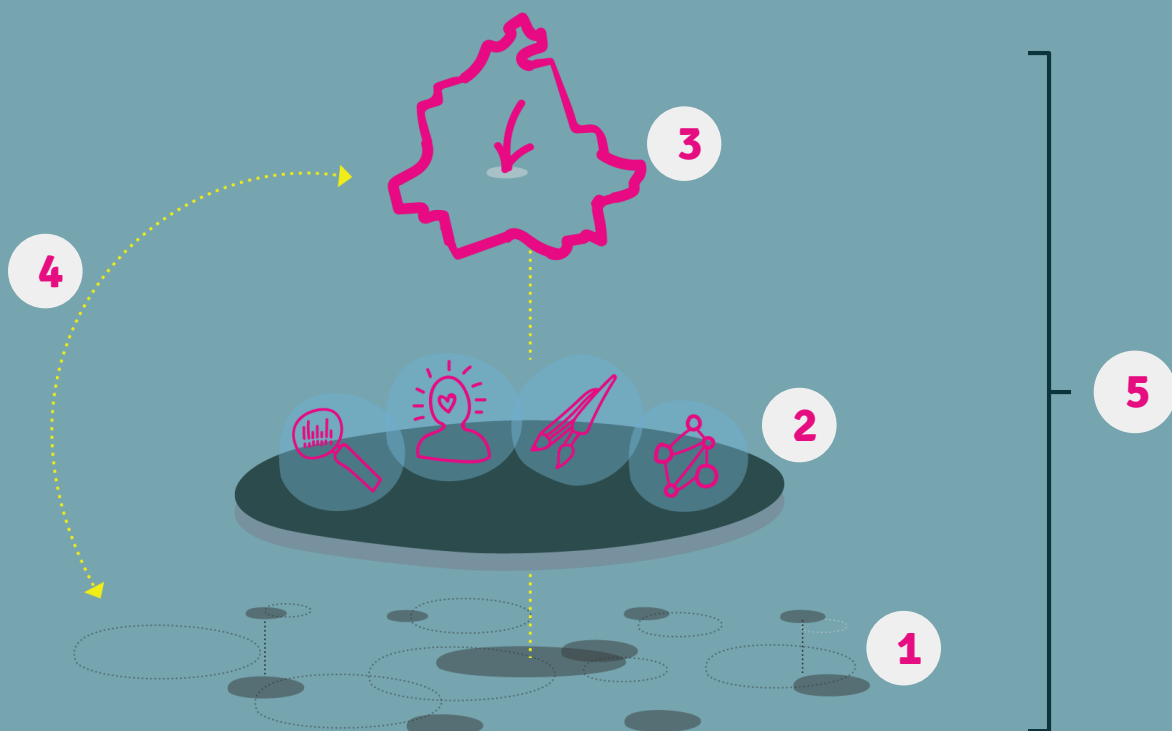
Our inquiry:

How might we understand and explore the economy and inequality?

Our organisations and the work that we do are heavily affected by larger systems and influences such as the economy and inequality. These are all interconnected. To make genuine change, these need to shift as a whole. For philanthropists, this requires a shift in thinking and new ways of working in order to change the game. We need to be attentive to and understand how we, as a collective, sit across tkey issues, and also how these affect us and our mission. And ultimately, how what we do contributes towards affecting change as this level.

System of Philanthropy

The Bigger Systems of Systems
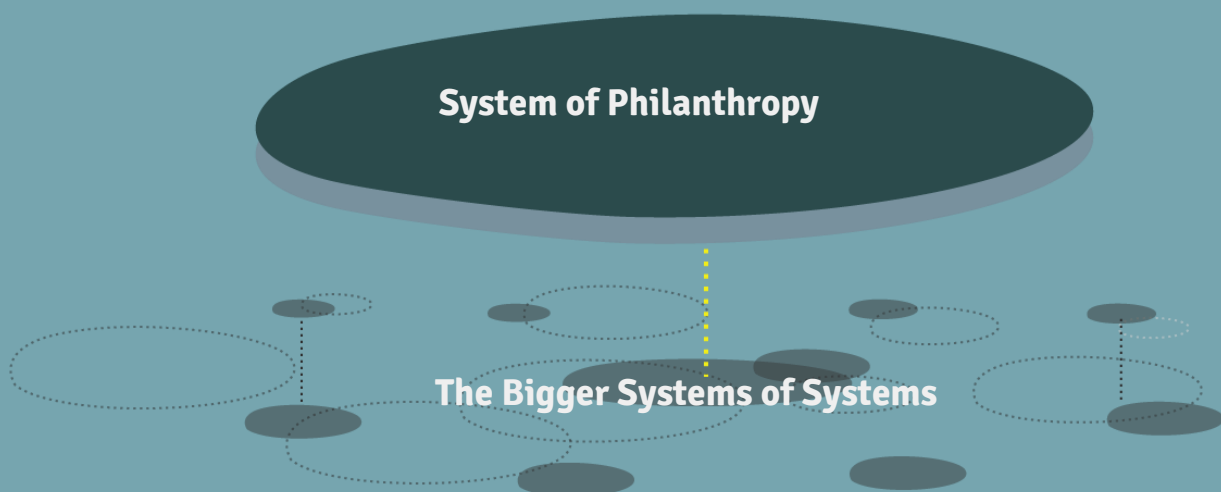
The Economy

How could we advocate for heterodox curriculum in economics at university? How can we support the degrowth movements and narrative? **How can we learn from the transformative economies network within *EDGE*?** How can we reconnect the investment industry to real life? **How can we encourage more funders to work on the economy?** How could we shift the general public to more value based economics? **What is the impact of individual choices e.g. amazon?** How does technology and artificial intelligence affect us? **What will happen post-Brexit?**

Health
How could we shift from cure to prevention with immediate demand from patients? How can we expand social determinants of health into economy, wealth, access?

Environment
How do we connect activists on the ground to the government? How can we create positive consortiums of environmental change makers?

Children
How can we make change fast when childhood doesn't last long? Who is responsible for children?

Communities
How can we counteract the reduction of investment in the voluntary sector? How can we support the degrowth movements and narrative?
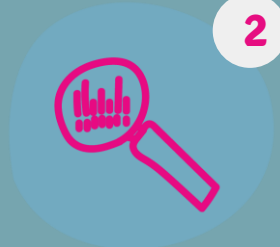
Our inquiry:

Leveraging our existing assets; what are they?

Sectors we need to nudge to make change:
Corporations
Businesses
Media
Popular culture
Technology

The Long-Now

Luxury of Time

Opportunity to Experiment

Community Leaders

Young Campaigners

Independence

Networks

Convening Power

Endowment

Spending to do good

Influence Democratic Process

Power

Participatory Grant Making

Transparency

Processes

Our Board

Influence and Access

Information

Helicopter View

Data and Evidence

Influence Markets

Joint Influences

Website and Media

Communication

Mediation

Objectivity

Popular Culture

Celebrities

Brand

Learning

Our inquiry:

What are the skills for systems change driven by philanthropy that we can start to explore?

Create the conditions
Why? To manage conflict and emotions
How? Use facilitators and mediators

Widen Perspectives
Why? To empower, diversify, test assumptions
How? Share stories rather than theory and create shared language, be attentive to unconscious bias

Define the Problem
Why? To focus on the system, not the solution
How? Share Complexity Lab videos with colleagues, reframe the problem using perspectives

Experiment
Why? To create true space for risk
How? Create community of practice of innovators to invest in the 'Long-Now' (developing crazy ideas now, in the hope they will mature and create a hopeful future)
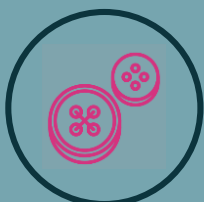
Incremental Change
Why? To escape stasis, and yet take risks safely
How? With any change, move from 'Same Same' to 'Same Different' to 'Different Same' to 'Different Different' when thinking about *how* you are doing something differently, and *what* you are doing differently.

Systemically Measure
Why? To expand reach and not be limited by what we already know
How? Evaluate using what matters to real people, momentum building, learn whilst measuring, showcase good practice

Our inquiry:

What are the behaviours for systems change that we can start to explore?

"**Ask questions**"

"Admit to ignorance"

"Liberation and leadership needed for galvanising vision"

"Feel the elephant"

"**Need to go 100% all in to do this**"

"Need to be more adaptive, creative, evolutionary and new energies."

"What are our definitions of 'the right person' to run our organisations?"

"Need to feel comfortable"

"Attentive to unconscious bias"

"Be aware of privilege and its effects"

"**Manage personal emotions and be attentive to, and practice, empathy**"

"There's a need to constantly zoom in and out, across nested systems"

"Being comfortable with discomfort"
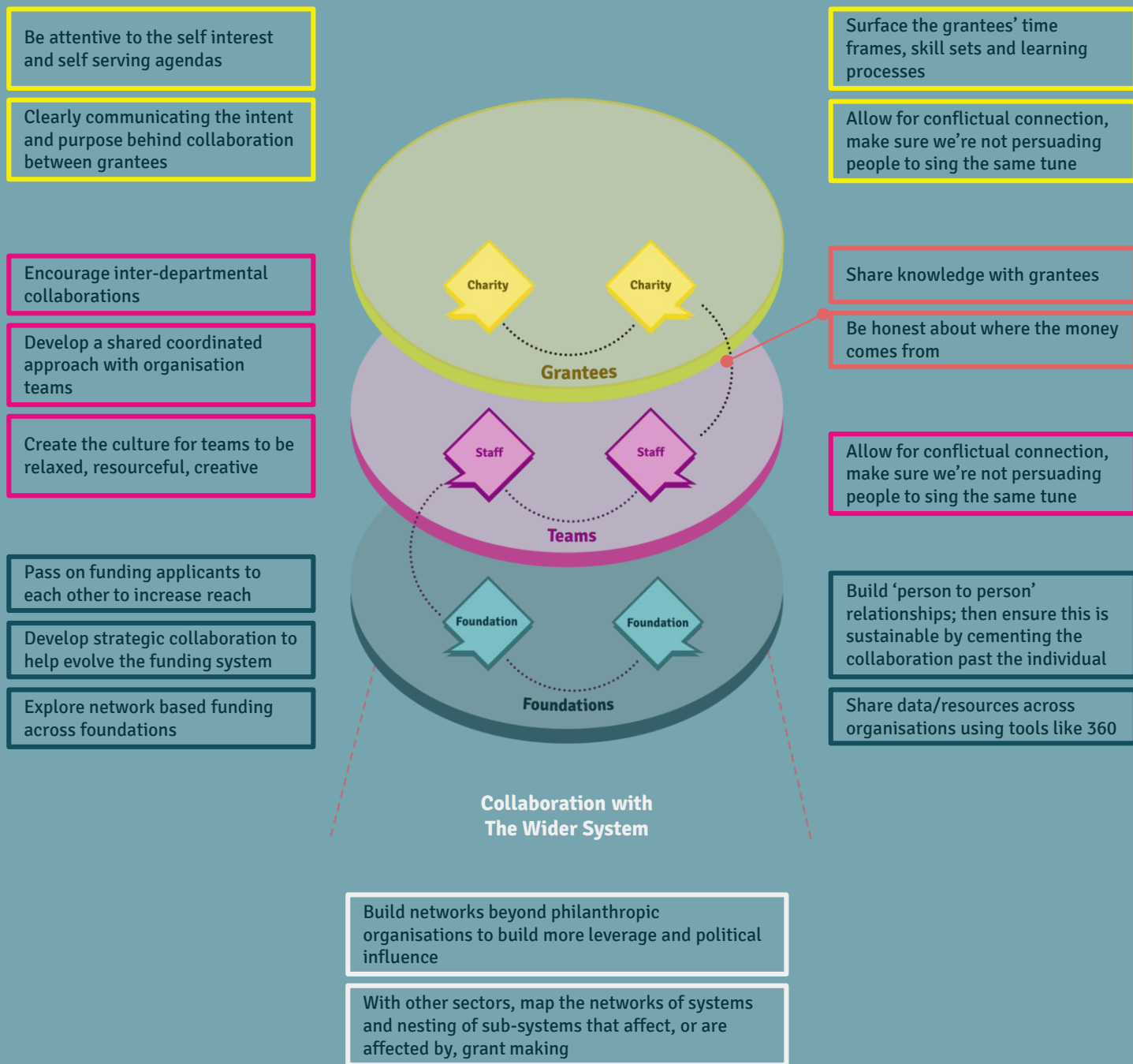
Our inquiry:

How might we encourage collaboration, not competition, in our system?

We discussed that collaboration is key to many aspects of systemic change, from gaining perspectives to empowering charities to creating alternative solutions to social problems. The diagram below pulls out key points raised when understanding how collaboration can exist at different levels, from between charities to between charity and foundations to between foundations and the wider system.

Be attentive to the self interest and self serving agendas

Clearly communicating the intent and purpose behind collaboration between grantees

Encourage inter-departmental collaborations

Develop a shared coordinated approach with organisation teams

Create the culture for teams to be relaxed, resourceful, creative

Pass on funding applicants to each other to increase reach

Develop strategic collaboration to help evolve the funding system

Explore network based funding across foundations

Surface the grantees' time frames, skill sets and learning processes

Allow for conflictual connection, make sure we're not persuading people to sing the same tune

Share knowledge with grantees

Be honest about where the money comes from

Allow for conflictual connection, make sure we're not persuading people to sing the same tune

Build 'person to person' relationships; then ensure this is sustainable by cementing the collaboration past the individual

Share data/resources across organisations using tools like 360

Charity · Charity

Grantees

Staff · Staff

Teams

Foundation · Foundation

Foundations

Collaboration with The Wider System

Build networks beyond philanthropic organisations to build more leverage and political influence

With other sectors, map the networks of systems and nesting of sub-systems that affect, or are affected by, grant making

Our inquiry:

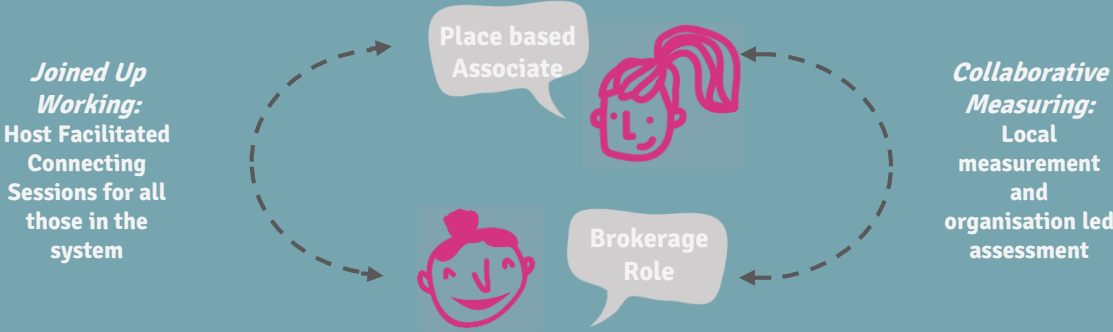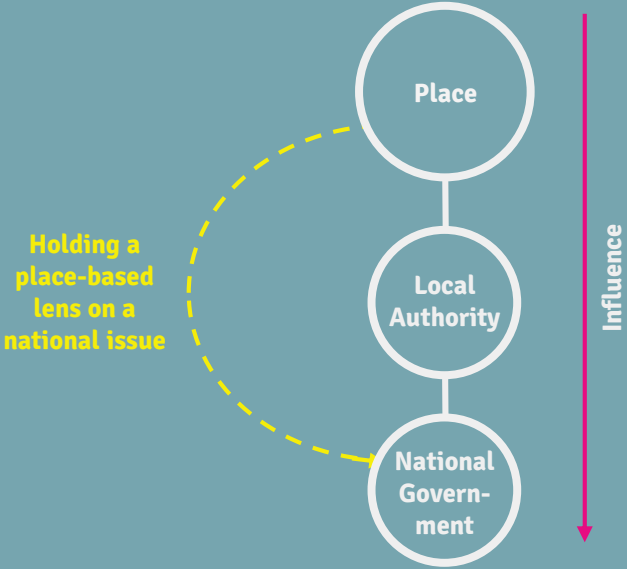# How might we explore place based systemic change?
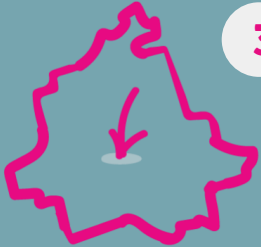
Over the two days, we started questioning the following; how do we reach new communities effectively? How do we ensure local voices are not being lost? What is our role in tackling inequality on the ground?

And, how do we reach new and unreached communities effectively? As introduced by Lankelly Chase and practiced by colleagues in the room, action inquiry and a place based approach offered a way to explore these questions in greater depth. It is about a long term education of philanthropists by enriching their connection with the public.

At a Place Level — **Maximise Reach, Authenticity + Validity** — **Humility and Respect for Area** — **Deep Listening** — **Understand System + Context**

Place based organisation or charity as learning set partner

Joined Up Working: **Host Facilitated Connecting Sessions for all those in the system**

Place based Associate

Brokerage Role

Collaborative Measuring: **Local measurement and organisation led assessment**

Foundation as condition setting and learning partner

At a Foundation Level — **Channel Funding through Local Orgs** — **Facilitation Connecting Sessions** — **Mapping Systems: Share resources with place** — **Bring in the local voice to the room**

Place

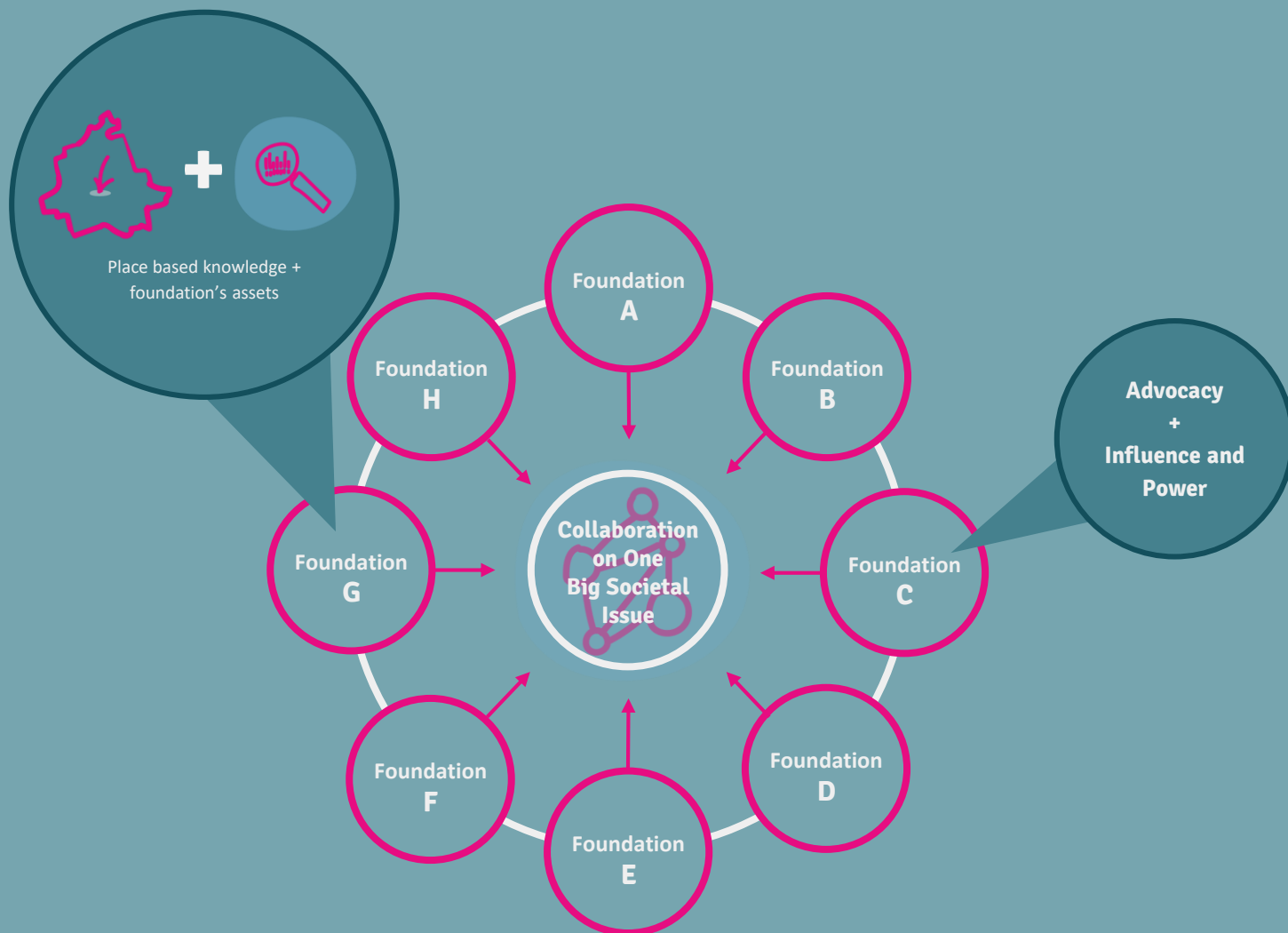Local Authority

National Government

Influence

Holding a place-based lens on a national issue

Foundations have the independence and collective potential to work across these layers of influence. Using a place based approach to take action, learning and stories from localities across the UK can build narratives of change with the aim of shifting the national agenda

Our inquiry:

How might we change the bigger systems through pooled influence?

Within the room, we recognised how much knowledge, insight and experience was present. This led us to explore how we could pool our learning, information and the relationships we hold to powerfully affect the bigger systems. We spoke of the potential of our collective power, influence and voice to affect the concerns of corporations, the private sector and government. This page explores how the assets we hold (explored on page 19) and the collaboration we strive to practice (explored on page 22) could begin to influence wider systemic challenges.

Place based knowledge + foundation's assets

Foundation A
Foundation H
Foundation B
Foundation G
Foundation C
Foundation F
Foundation D
Foundation E

Collaboration on One Big Societal Issue

Advocacy + Influence and Power

1	Actively decide on and collaborate on big societal issues (poverty, welfare state, etc)
2	For each foundation, pool the assets, place based knowledge, insights, tools and relationships necessary to aim to affect the big societal issue
3	Collectively explore technology, for example 4D, 360 or KUMU, to support democratic networking and sharing of the assets and knowledge between foundations
4	Build a collective case for change to shift the national agenda and positively affect the societal issue and bring leaders to bear.

Our inquiry:

How might we create a culture of learning?

Over the course of the two days, through conversations, from talks and from reflection, a key overarching theme has emerged, namely the concept of learning. This page outlines important aspects of learning that were raised over the two days. The external challenges include moving from quick results to experimentation and, therefore, we need a space for learning to stay connected to grantees and learn with them and to work across sectors with other actors in the systems.

We need to create a learning space to…

1. Take our own operations seriously
2. Be sensitized to contexts and learn with the organisations we fund
3. Dare to test and experiment with a trial and error mentality
4. Push policies to ethical investment
5. Relook at the grantmaking process, eg participatory grantmaking
6. Take on the philosophy of giving
7. Develop new types of evaluation and monetary processes
8. Gather and share global horizon scanning

An example of collaborative learning spaces:
CITIES OF CHANGE FUNDERS COLLABORATIVE – *EDGE Funders Alliance*

Exploring how philanthropy can play an important role in shaping a new narrative, new feminised cultures of inclusion and listening, and demonstrating that radical change is possible in people's lives.

Cities of Change Funders Collaborative aims:

- Make alternative systems in cities
- Move from national to translocal
- Ask ourselves how we can be pan-European?
- Forge solidarity between cities
- Find convergence and encouraging networks
- Complement initiatives
- Create opportunities to learn across cities
- Explore the politically radical
- Explore the post-state

We know that systems are always evolving regardless, and this is a great opportunity to learn to continue to learn. We need to notice when we stray from a 'learning' mindset to an 'outcomes' mindset, and also be honest in moments of realisations and revelations. We need to promise to always keep moving, growing and learning in the process of systemic change.

06 Tensions

The tensions below illustrate some of the topics that arose over the two days and illustrate the need to be aware of conflicting approaches, agendas or framings within the process of change. Being attentive to tensions and holding a space to explore them further enriches the possibility of change within a system.

← LEGACY   RISK →

Systemic change in legacy-bound contexts is a challenge. Foundations are under pressure to perform to certain expectations. Risk could be detrimental to reputation but it could also create radical change for good.

There is a need to harness the potential of diverse perspectives. However, we need to be attentive to what the process of giving power means to charities and communities.

← PROTECTION   COLLABORATION →
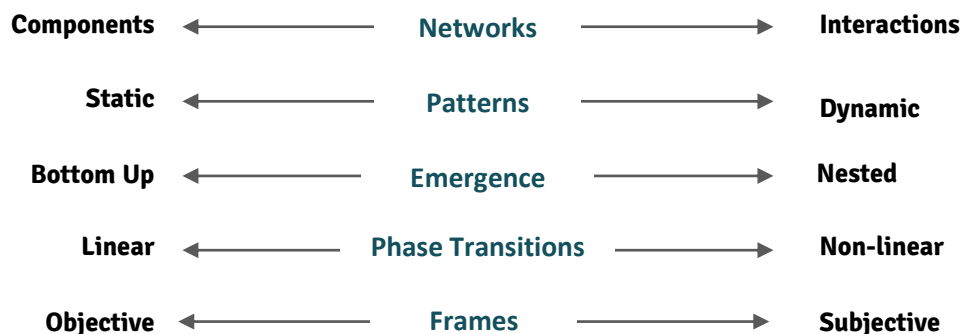
← POWER   DEMOCRACY →

Traditional power is needed to create the space before progress and change can be made. However, what does having a hierarchy and power differentials mean to change?

How do you shift power from the funder to the communities we are striving to support? How do we move between holding the power, or the money, to being a movement of social entrepreneurs?

← GRANT   CHANGE →

← MINIMAL   MAXIMAL →

There's a need to practice zooming out and zooming in, across nested systems, to the big picture and to the action happening on the ground. To strive to influence the big conversations and decisions.

The need to work with tensions rather than with polarities was raised on p5 when we explored the three schools of systems change.

	Networks	
Components ←	Networks	→ **Interactions**
Static ←	Patterns	→ **Dynamic**
Bottom Up ←	Emergence	→ **Nested**
Linear ←	Phase Transitions	→ **Non-linear**
Objective ←	Frames	→ **Subjective**

07 Collective Action Moving Forward

What has this new perspective provided to your understanding of what needs to happen next collectively?

01 Select a "thinking, accountability and Just Do It buddy" who we can debrief with in a month

02 "Deep dive" into systems theory in smaller groups

03 Create a collective safe space that encourages us to push and challenge ourselves

04 Explore technology, for example 4D, 360 or KUMU, to support democratic networking and sharing.

05 Create a funders community of practice where we share tools, guidance, examples of good practice etc

06 Board-to-board exchanges of learning and thinking across different organisations

07 Commit to the long term (10 years at least)

08 Intense focused spaces to bring in different 'others', creating more space for daring conversations

09 Actively collaborate on societal issues (poverty, welfare state, etc) in order to pool advocacy and to bring leaders to bear

10 Create a simple shared language with all in the system, from grant-givers to frontline workers

08 Attendees

Albert Chong	UnLtd
Alex Sutton	Paul Hamlyn Foundation
Alice Evans	Lankelly Chase
Allan Farmer	Corra Foundation
Andrew Barnett	Calouste Gulbenkian Foundation
Angela Seay	Polden-Puckham Charitable Foundation
Anna Whitton	BBC Children in Need
Carla Ross	Wellcome Trust
Christopher Graves	Tudor Trust
Erik Mesel	John Lyon's Charity
Farrah Nazir	Wellcome Trust
Felicity Mallam	Samworth Foundation
Fozia Irfan	Bedfordshire and Luton Community Foundation
Geetha Rabindrakumar	Big Society Capital
Haidee Bell	Wellcome Trust
Hannah Stranger-Jones	Unltd
Hetan Shah	Friends Provident Foundation
Jenny Rouse	Big Lottery Fund
Jenny Oppenheimer	Lankelly Chase
Jill Baker	Lloyds Bank Foundation
Jo Bibby	The Health Foundation
Jo Wells	Blagrave Trust
John Mulligan	Esmee Fairbairn
John Healy	Genio
Julian Corner	Lankelly Chase
Lajaune Lincoln	Peabody
Lenka Setkova	Coutt's Foundation
Lisa Clarke	Lankelly Chase
Madeleine Clarke	Genio
Matthew Mezey	The Health Foundation
Nicola Pollock	The John Ellerman Foundation
Nicolas Krausz	Charles Leopold Mayer Foundation
Paul Streets	Lloyds Bank Foundation
Rose Longhurst	Edge Fund
Ruth Davison	Comic Relief
Sara Llewellin	Barrow Cadbury
Sarah Cutler	Paul Hamlyn Foundation [Consultant]
Sarah Ridley	The London Marathon Charitable Trust
Simon Antrobus	BBC Children in Need
Vidhya Alakeson	Power to Change
Vivian Paulissen	European Cultural Foundation
Will Somerville	Migration Policy Institute