

# THE PILGRIM TRUST

## Past and Present

### History

The Pilgrim Trust was founded in 1930 by an American, Edward Stephen Harkness. Edward's father had built up the Harkness fortune as John D. Rockefeller's right-hand man when Rockefeller was building up his oil empire. Edward and his wife had no children to whom to leave their vast wealth and so they adopted a course of what was termed 'systematic philanthropy'. It is said that Edward gave away nearly £30 million during his lifetime and he died in 1940 leaving a further £20 million. He was the Bill Gates of his day.

Most of Edward Harkness's gifts were made in his own country and particularly to Harvard and Yale for the building of 'houses' for the students, thereby making the Universities residential after the pattern of Oxford and Cambridge. But he always retained warm feelings for the country from which he drew his descent—his ancestor had emigrated to America from Dumfriesshire in 1716—and when, during the later 1920s, a steadily increasing number of appeals for financial help reached him from Britain, he was concerned. It was evident to him that Britain was going through a bad time and he wanted to help but he did not have the knowledge to discriminate between the projects before him.

From conversations with Harkness's friend Sir James Irvine, Principal and Vice-Chancellor of St Andrew's University, the idea emerged that Harkness should place a portion of his fortune in the hands of British trustees, who would know far better than he what the needs of their country were, and who could do good in Britain on his behalf.

The Pilgrim Trust was therefore established, with the former Prime Minister Stanley Baldwin as the first Chairman together with Lord Macmillan, the Scottish advocate who had become a Lord of Appeal, John Buchan, Sir Josiah Stamp and Sir James Irvine as his fellow trustees. The first Secretary of the Trust was Dr Thomas Jones, whom Baldwin was able to bring with him from the Cabinet Office.

Harkness gave the original trustees the equivalent of £2 million sterling. Coming at a time of great national depression, Harkness's spectacular gesture caught the public imagination. There was wide publicity in the Press and the King and Queen received the Harknesses at Buckingham Palace. Using the retail price index this £2 million would be worth about £80 million today.

The Trust Deed that established the Pilgrim Trust in 1930 says that both capital and income can be applied for such charitable purposes within Great Britain and Northern Ireland as the Trustees may determine. The preamble to the Deed, written by John Buchan, states that the Donor wished the funds to be used "for some of her (Great Britain's) more urgent needs" and that the gift "may assist not only in tiding over the present time of difficulty but in promoting her future well being". Such a wide brief would be unusual today, but it has given the Trustees the power to make decisions about what to fund. The founder always made it clear that he did not wish to influence the Pilgrim Trust.

### Early Years

The first Annual Report of the Pilgrim Trust states that the Trustees decided to apply their resources at "key-points of the present distress and at the same time to help our land to emerge from the present crisis with its vigour undiminished and its inheritance from the

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past unimpaired". "The existing economic circumstances of the country create the need for special efforts in relieving distress and poverty, while at the same time these efforts absorb funds which in normal times are available for preserving the many things in England that are so abundantly worth preserving." It was therefore decided at the beginning of the Trust's history that the Trustees should assist with social welfare projects, with preservation (of buildings and countryside) and with promoting art and learning. In the 1930s the majority of social welfare projects were concerned with unemployment, while historic preservation grants were mainly aimed at churches, cathedrals and ancient university buildings. In addition, Trustees assisted with the preservation of the countryside and with learning in the form of purchases of important archival material and improvements to libraries and muniment rooms.

The first public grant given by the Trustees in 1931 was towards the underpinning of Durham Castle. The Archbishop of Canterbury acknowledged the significance of this grant in a speech at a lunch in that year to honour Edward Harkness. He referred to "the saving of Durham Castle and preserving forever surely one of the most magnificent and beautiful spectacles in not only this country, but in Europe or America". The Durham Castle Preservation Fund had launched a major appeal and by the end of 1930 had raised £43,000 but £25,000 was still needed to carry out the emergency work to prevent the Castle sliding into the River Wear. The Pilgrim Trustees agreed to provide the whole of this sum.

During its first ten years the Pilgrim Trust made grants totalling £1 million. Most notable among these was the establishment of a committee of enquiry, under the Chairmanship of Archbishop Temple, to study the wider causes and effects of unemployment. The Trust subsequently published the findings of this survey in a book entitled *Men Without Work*, which made a considerable impact at the time and is still consulted today.

For the duration of the War there was no unemployment but nor were there any repairs made to historic buildings. The Trust instead turned its attention to recording the buildings and places that were liable to be destroyed by enemy action. Artists were commissioned to draw or paint scenes that might disappear. These were published in a four volume series *Recording Britain*. The original works are now in the Victoria and Albert Museum. At this time the Pilgrim Trust also established a Council for the Encouragement of Music and the Arts, known as CEMA, which later developed into the Arts Council of Great Britain. A grant of £50,000 was used to bring entertainment to people under wartime conditions. This was so successful that at the end of the War the government decided to take over CEMA as a permanent responsibility and the Arts Council was born.

The ending of the War and the election of a Labour government brought about the founding of the Welfare State. The Trustees of the Pilgrim Trust believed that this "safety net" would lead to poverty in the old fashioned sense being eliminated. In contrast, the historic heritage was in a sad state due to lack of repairs and maintenance during the six years of war. This was where the Trustees concentrated their resources over the next thirty years. They also funded the performing arts, museums, galleries and libraries.

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Gradually the Pilgrim Trustees came to recognise that the Welfare State could not and would not solve all society's problems. They now consider that the role of a grant giving charity is to fund risky and innovative projects in the hope that if they prove to be successful other sources of money might step in. The Trustees were among the first supporters of the hospice movement. They have also given grants towards projects for people who are homeless, those with mental health problems, people with disabilities, the elderly and those caught up in the criminal justice system or with drug or alcohol problems. Until the 1990s the areas of interest remained very broad and just about any project was eligible for consideration. Trustees also committed a large number of small grants, believing that it was right to support as many projects as possible and that seed funding from the Pilgrim Trust would encourage others to give.

## Today

More recently, however, the Trustees have defined their priority areas more closely and, over the last 10 years, have discussed at length how they can best use the Pilgrim Trust's resources in the most effective way. In 1930 the Pilgrim Trust's spending power was considerable and there were few other grant making charitable trusts. Now, with an annual income of around £2.5 million and many other much larger grant making foundations in existence including of the National Lottery, Trustees find it a challenge to decide where a Trust of comparatively modest resources can make an impact. This problem was discussed, in particular, in the run up to the publication of new Guidelines for Applicants at the end of 2005. Trustees agreed that they wished to narrow the Pilgrim Trust's areas of interest. In the field of social welfare it was decided that the priorities would be confined to projects that support people with drug and alcohol problems. It was also agreed to support projects in prisons and projects providing alternatives to custody, with an emphasis on projects that assist prisoners to acquire new skills, give support to their families or assist with resettlement upon release. Few grant making trusts will support running costs and this is often the most difficult area to fund. The Pilgrim Trust is willing to support such costs in certain circumstances as well as supporting new, risky and untried projects. The Trust was one of the first funders for a project to support women who had never been in prison before. This project – the first night in custody project – has since been established in a number of prisons and attracts statutory funding. The Pilgrim Trust has also supported an innovative and, to some, risky project to train serving prisoners at Wandsworth Prison as peer advisers. Again, this has now been rolled out into other prisons and a further project to train inmates as teachers has been initiated.

Trustees are also looking at ways to support the organisations that apply to them by offering more than just money. By working collaboratively with other foundations more money can be drawn into a project. Also, information and expertise can be shared. The Pilgrim Trust has over the past few years employed a specialist adviser on addictions projects jointly with the J Paul Getty Junior Charitable Trust. The adviser spends one day a week with each trust and for the rest of the time carries out research at the National Addictions Centre. The Trust has also established a link with the Centre for Charity Effectiveness at the Cass Business School and will fund training or consultancy for those applicants that need extra support.

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In arts and heritage the previous categories of Preservation and Art and Learning have been amalgamated into a new category of Preservation and Scholarship. The performing arts are not currently supported. Trustees want to assist with those causes that find it difficult to raise funds from other sources. In the heritage field many funding bodies are concentrating on access, education and the broadening of audiences. While this is to be applauded, it has meant that less money has been available for the essential work of collections care and management. This is where the Pilgrim Trust is currently concentrating its resources.

The Pilgrim Trust no longer has the spending power to make a major contribution towards historic building repair grants in the way it did for Durham Castle in 1931. Therefore, the Trustees try to use their funds more imaginatively. They might provide seed money to get a project started by enabling the production of feasibility studies, business plans or even paying the salary of the project manager to get the organisation to the point where it can apply for major grants. The Trust can also be the first funder when the case appears to be hopeless but there is a chance of encouraging others.

### **Looking Ahead**

Although arguments can always be made about the value of small grants, Trustees believe that they can make more of an impact and can better judge how effective their grant giving has been if they move towards giving fewer, larger grants and seek to develop a relationship with those bodies that receive their support. They have also begun to work more with organisations that can bring their expertise to bear on the grant making process. The Pilgrim Trust is currently working with The National Archives, the Association of Independent Museums and Shelter on major projects concerning cataloguing, conservation and a project to resettle ex-offenders emerging from Leeds Prison. These large and long-term commitments mean that less money is available for other projects at a time when the economic climate will mean more of a struggle for funds. However, difficult decisions have always had to be made and the Pilgrim Trust, along with every other grant making trust, will always have many more applications than it can possibly satisfy. The Trustees want to make a difference and larger grants that can be properly evaluated are the most likely way to achieve this aim.