

ROCKET SCIENCE



The Pilgrim Trust

The Pilgrim Trust

**A review of the Trust's social
welfare funding, 2016-2019**

Summary Report

December 2020



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1. Background and context to the Review

“What’s the use of having the money if you can’t have the fun of spending it?” (Edward S. Harkness)

The Pilgrim Trust, founded in 1930 by the American philanthropist Edward Stephen Harkness, is a long-standing UK-wide funder, with a dual focus on the preservation of the country’s historic fabric and the promotion of its social welfare. The Trust’s annual grant making amounts to around £3m per annum to a wide range of charities and public bodies.

Around £1.2m (40%) of the Trust’s grants, is focused each year on its chosen social welfare priorities, which since 2016 have been to improve the life chances of vulnerable women and girls. The Trust aims to “affect the greatest change and maximum impact” with the resources it has, funding innovative projects and supporting “early intervention” which address social needs before these become too deep-seated.

Having funded its current priority for the past four years, 2016-19, the Trust commissioned Rocket Science in August 2020 to:

1. Analyse the social welfare grants data (2016-2019) provided by the Pilgrim Trust in order to identify funding trends, grantee demographic, activities funded and outcomes achieved.
2. Review the effectiveness and the impact of the Pilgrim Trust’s funding of vulnerable women and girls’ services highlighting achievements, challenges and lessons learned.
3. Recommend how the Trust could maximise the impact of its grant funding in this area including tightening its focus, collaborations, leverage and developing its influencing and thought-leadership role.

The main premise for the review was the Trust’s recognition that it felt quite unsighted on the effectiveness and impact of its grants. What difference have they made? Has the intention to fund early interventions been effective? What might the Trust do differently in future?

The review sought to answer these questions by layering and analysing information from three different sources: the Trust’s own grant data; desk research on the women and girls sector and its funders, plus a wide range of interviews comprising trustees and staff (12), a selection of grantees (10) and a sample of comparator trusts and foundations (7).

Any review of 40% of the Pilgrim Trust’s annual grant making cannot be seen in isolation from the charity’s overall vision and values. The current trustees perceive the Trust as a highly reputable if somewhat traditional grant maker, but one which is at a crossroads. We present this as a set of choices which the Trust is currently facing, the answers to which will shape the organisation’s future direction as it moves into its tenth decade (see figure 1). They represent opportunities to reaffirm, if not update, the values and vision of the Trust and its original benefactor, as a mark of the Trust’s reaching its centenary in 2030. They also help to frame the review’s main recommendations (see section 4).

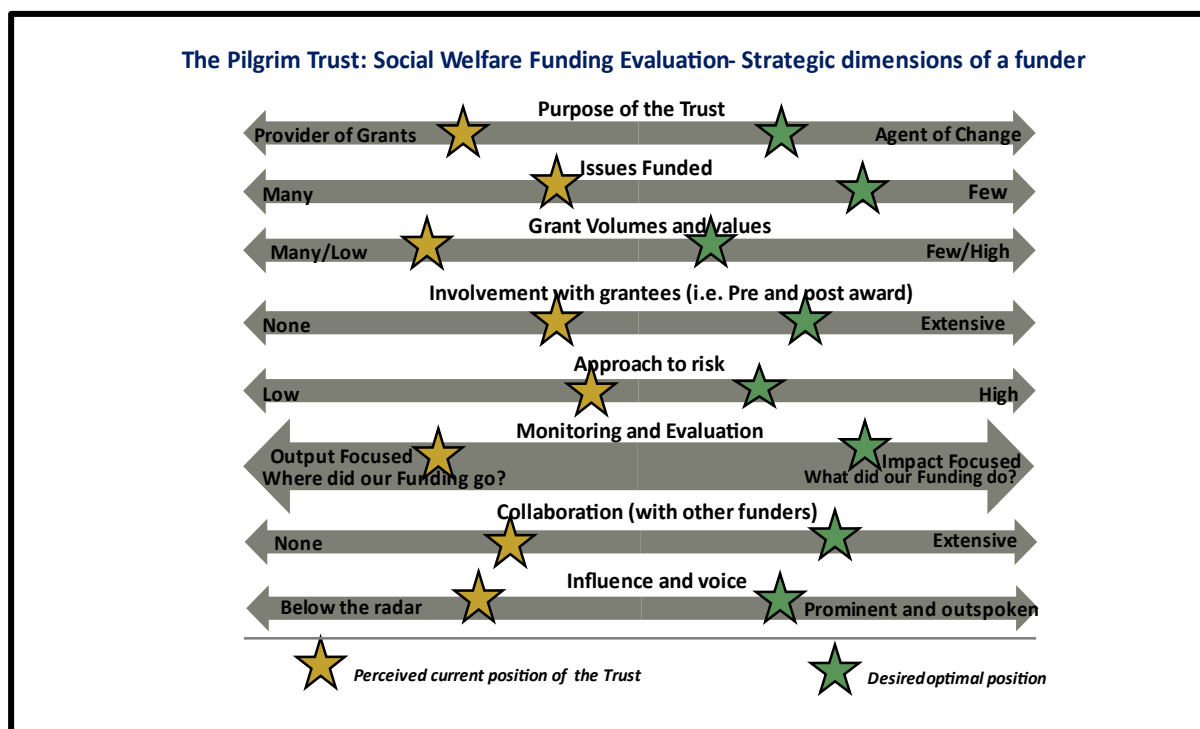


Figure 1: Perceptions of the Pilgrim Trust's Social Welfare Grants – current position and future potential

2. The Pilgrim Trust's Social Welfare Grants, 2016-19

2.1 Key Findings

The Trust's focus on improving the life chances of vulnerable women and girls has enabled a wide range of organisations to create lasting impacts for individuals, their families and wider communities in many different parts of the UK. We did not hear any dissenting voices, either internally or externally, suggesting the Trust should at this juncture alter the target of its social welfare grants, especially given rising demand and the adverse effects of the covid-19 pandemic.

Inconsistencies in the quality and quantity of the Trust's own data, as well as in the definition and interpretation of early intervention, mean that considerable resources are required to synthesise and analyse grantees' reporting. However, we have discerned that:

- the majority of projects funded by the Trust cut across multiple themes, using 'whole systems' and holistic approaches to support women on their personal journeys towards gaining independence through a variety of means and routes.
- almost three in ten projects work with BAME and/or migrant women's organisations.
- more than half of projects funded recorded improvements in both the mental and physical health of their participants; many using creative approaches to support client groups,



although grantees were also quick to remark on the value of the Trust's preparedness to fund tried-and-tested service models, rather than insisting (as many funders do) on innovation.

- over a third of all grantees used their backing from the Trust to leverage additional funding from other independent and/or statutory sector funders.
- a similar proportion made the co-design and co-production of services with clients a key element of their project, focusing on the value of empowering marginalised women and girls, building their confidence and instilling leadership.

Grantees speak highly of the Trust and its staff team, commenting on its willingness to fund what others shy away from; its commitment to meeting core costs as well as long-term funding (in some cases over several years) and its being prepared to trust its grantees as the experts.

The Trust is well positioned to use its grants as an agent of social change. However, this requires funding less (amending its application processes) to enable building closer relationships with grantees; tightening the Trust's focus, whether on the principle and practice of early intervention and prevention, the intersectionality in the marginalisation of certain women and girls, or the potential of joining forces (as the Trust did previously to influence funding for women experiencing the criminal justice system) to address more systemic or structural causes of disadvantage, and not just its consequences.

2.2 The Trust's social welfare grant funding, 2016-19, in numbers

The Pilgrim Trust operates a two-stage application process, with stage one acting as a filter to allow through those applications which most strongly meet the Fund's criteria. Over the last four years (2016-2019), the number of applications at stage 1 has gone up, as has the number of applicants receiving funding; in total the Trust awarded 153 social welfare grants amounting to £4,980,477 (an average grant award of c.£32,550).

Around a quarter of all applications received funding, rising from 22% in 2016 to 27% in 2019. Last year saw the Trust's grants at their smallest average level during the period, despite 2019 recording the second largest total social welfare grant spending, raising some concerns that in responding to rising demand it endangers spreading itself too thin.

Given the increasing level of demand for the Trust's funding, it is in the interests of both the Trust and potential applicants that the Trust's application process is as efficient as possible; reducing the amount of time spent both by would-be grantees and the Trust's grants manager on unsuitable proposals, whilst driving up the appropriateness of those which pass initial eligibility checks.

The **tendency of the Trust to fund small and medium-sized organisations** is evidenced by the data on their annual turnover, as well as staff and volunteer numbers. Most grant recipients (between 60-70% each year) had a turnover of less than £1 million.



Total income / Year	2016	2017	2018	2019
Under 100k	9%	3%	0%	4%
100k to 499k	38%	27%	47%	44%
500 to <1 mil	20%	27%	15%	13%
1 mil to <5 mil	24%	39%	33%	29%
5mil to < 10mil	6%	3%	2%	4%
10 mil to <100 mil	6%	3%	0%	2%
100mil +	0%	0%	2%	2%

Figure 2. The proportion of social welfare grants awarded based on the size (turnover) of applicant organisations

Close to a third of the Trust's grantees had 10 or fewer employees. However, again there is not a consistent pattern in the proportion of different employee bands, and the number of volunteers amongst grantee organisations varied substantially.

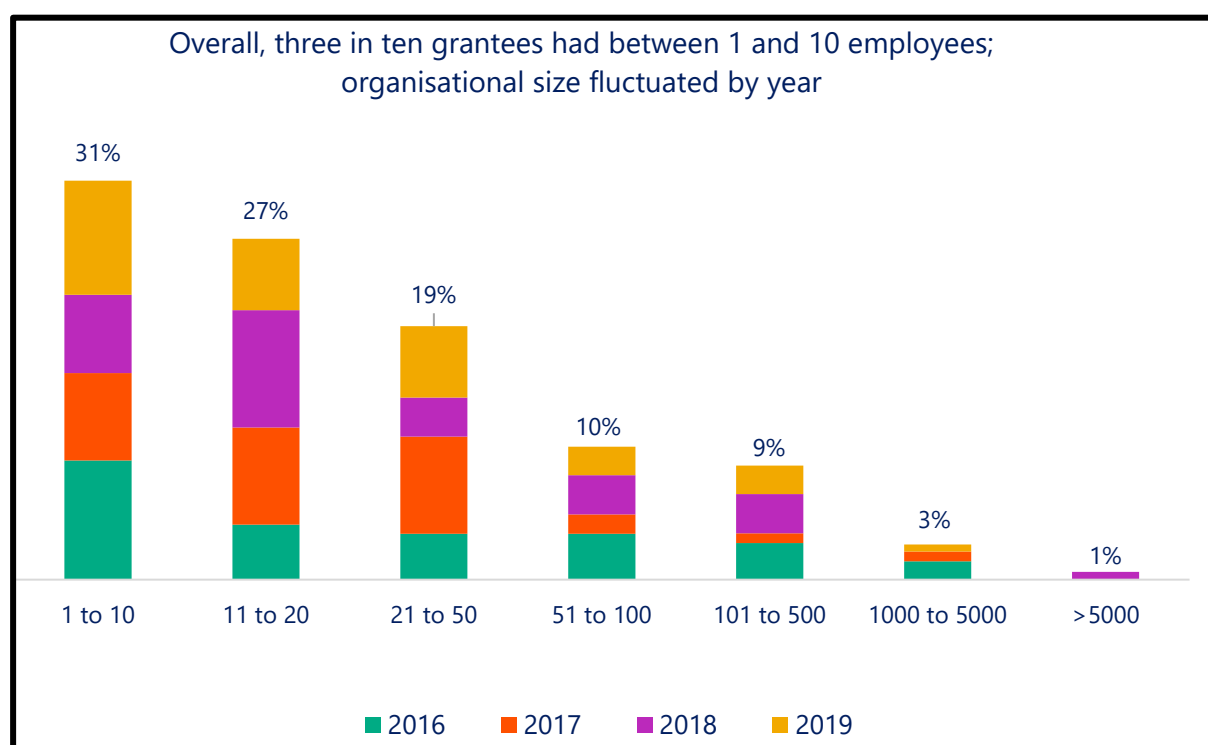


Figure 3. Number of employees in each organisation by size band and year

Average grant sizes have varied over the years. In 2018, and particularly in 2019, the sizes of the Trust's awards have become more consistent, clustering around the mid-size (£30-40k), as shown in Figure 4.

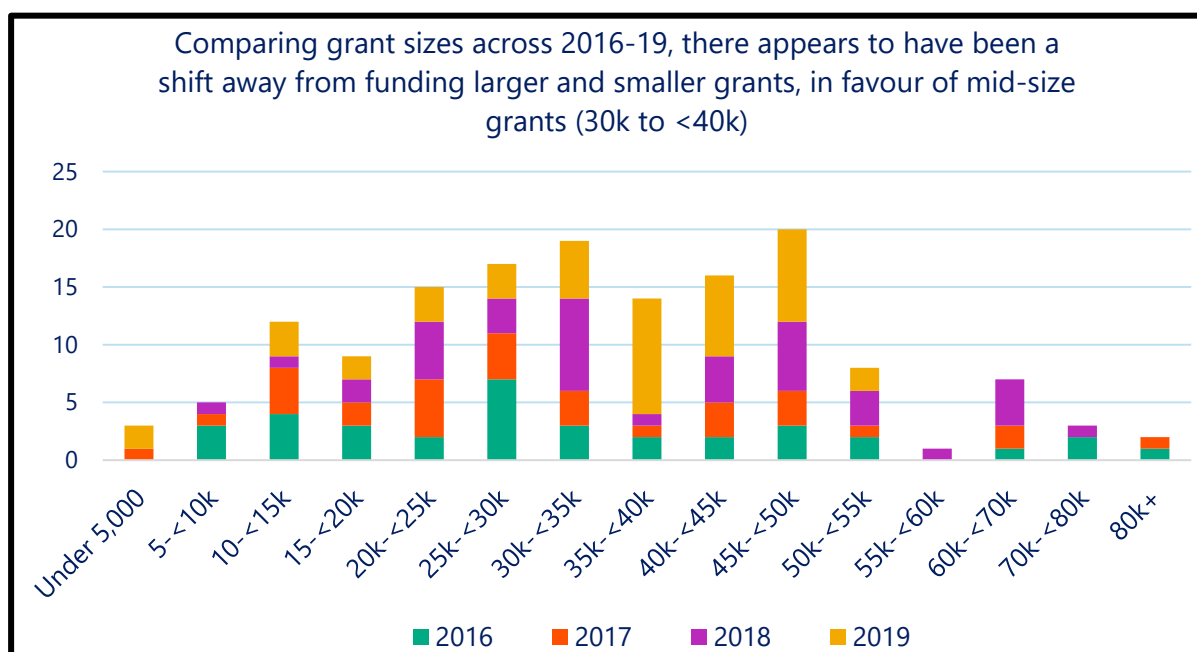


Figure 4. The Pilgrim Trust's Social Welfare Distribution of Grants, 2016-19

2.3 Challenges and lessons learned

The Pilgrim Trust's intention to **focus on early intervention** is borne out in the projects it funds; the definition of what constitutes early intervention and prevention is quite loose, encompassing a broad range of initiatives, which reflects the need for many different types of early intervention and prevention to support vulnerable women and girls effectively. However, it also means that a desired focus on early intervention and prevention is not currently curbing the number of applications received in stage 1. As the voluntary sector continues to feel the impact of covid-19, demand for the Trust's funding is only likely to rise. The Trust could usefully provide examples at stage 1 of the application process of the types of early intervention and prevention that it would like to fund, and using it as a guide to projects' eligibility.

Improvements in mental and physical health were common outcomes. Half (50%) of the projects sampled described positive mental health benefits amongst their participants. This could be a direct consequence of psychological interventions, such as one-to-one and group counselling, or an indirect effect of other forms of support, such as greater socialising and skills training.

While many **innovative approaches** were deployed by funded projects, others emphasised the importance of continuing with **tried and tested methods** to support their client groups.

More than a third (35%) of organisations reported that the Pilgrim Trust's investment was instrumental in enabling them to leverage other funding - a consequence of their ability to evidence outcomes to other funders; getting 'on the radar' of other organisations, or simply from having more time to apply to other funds thanks to the stability offered by a multi-year grant.



Greater access to support and advice was important for marginalised women and girls, many of whom did not know where to turn, or did not trust statutory agencies. Half of projects sampled recorded this as an outcome for participants, including their enhanced ability to navigate the healthcare system, and feeling more confident to ask services for help before reaching crisis point.

Around one in three projects made the **co-production of services** a key element of their project, a feature which is increasingly sought by funders. This can be important to understanding need, as well as for **empowering marginalised women and girls** beyond the project's lifetime, giving them a voice with decision makers and service providers. Several organisations included leadership development and courses in public speaking as part of their project, encouraging community leaders, peer mentors and client-led workshops.

The following infographic demonstrates, in grantees' own words, some of the ways in which the Pilgrim Trust's funding has made a difference to their organisation, the services they deliver and the individuals whom they support:



IMPACTS OF FUNDING

"It isn't too dramatic to say that the support saves lives, it really does. Lots of people have suicidal thoughts, they cannot live with the impact of the trauma they have had. Sometimes it is about getting through the day and working through the next step. There have been lots of examples where it has kept people alive."

Argyll & Bute Rape Crisis (ABRC)

[Funding has] "massively increased our reach... It means we can respond to what's happening, for example with Brexit and increased racism, increased Islamophobic violence against women and girls"

Integrate UK



"I have to bring it back to individuals... I'm thinking of someone who was in a very coercive abusive relationship - she still texts me saying how well she is doing, she got out of that relationship and is really doing ok and that's enough for me... I think we have a future for this project now and that's massive... Pilgrim Trust has enabled us to generate something that has been going for three years and will keep going and we have got better at what we do too, we've got to refine it over that time."

Exeter Community Initiatives

"Deaf people are... about three times more likely to experience abuse and nobody else is doing this work in BSL. We acknowledge that deaf young people have a range of needs, some have cochlear implants some have hearing aids, we do the most to ensure it's all visually accessible, we encompass a lot of different needs."

SignHealth

"If we hadn't got money from the Pilgrim Trust, potentially the project wouldn't have happened. It was really supported by the Pilgrim Trust, they were the initial funder. Their flexibility allowed us to move the goal posts and create the project we needed to."

Welsh Women's Aid

[Without funding] "we wouldn't have been able to reach as many young women without a shadow of a doubt. I don't think there are a huge amount of charitable funders that have social welfare or human rights or violence and abuse focus, not a huge number with focus on mental health - you would think there were more but there are aren't."

Women's Counselling and Therapy Leeds



3. The changing context of women and girls' funding

In recent years, [the funding landscape across the different nations of the UK](#) has shown greater variation, with the Scottish Government seemingly more inclined to fund specialised women's organisations than the government in England. The post Brexit withdrawal of the EU Structural and Investment Funds is only likely to increase competition among women's services for grant-funding at a time of rising demand stemming from the current public health crisis. Dedicated funding is needed to address ways in which [women and girls in the UK are likely to be more disadvantaged than men](#), including: earning less money, doing lower paid work with less progression whilst having more care responsibilities, less freedom and leisure time. These structural factors and gender-informed experiences can intersect and contribute to other issues such as homelessness, mental health problems, domestic violence, drug and alcohol problems, and sexual violence or exploitation. As one of Comic Relief's Partnership Managers commented: 'Women's services see women, not a domestic abuse case. They need to respond to the woman, not just a single issue'.

3.1 The current funding landscape

The range of issues which intersect in the lives of disadvantaged women and girls invariably means the funding of the sector is complex. There is no single, dedicated women's fund in the UK. Over the past five years, significant levels of funding targeted at women and girls has come in the form of the Tampon Tax Fund (via DCMS) and which, for 2020/21, prioritises violence against women and girls (VAWG) and young women's mental health and wellbeing. Funding from the government has also accompanied the most recent [VAWG Strategy](#), which includes financial support to local authorities. Large public and charitable funders like the National Lottery Community Fund (NLCF), Comic Relief, and Esmée Fairbairn have all invested in streams of women and girls funding over the past five years, often driven by the priorities of, and/or providing onward funding from, the Tampon Tax or the VAWG strategy. There are a few dedicated specialist women's funders, such as Rosa Foundation, Smallwood Trust, and the Coutts Foundation. The different priorities and timescales of these smaller trusts and foundations mean that a wide variety of agendas are in play.

Certain issues in the women and girls' sector are underfunded. VAWG tends to receive a significant proportion of the sector's funding; the issue retains a high profile, and has remained in the spotlight during the Covid-19 pandemic. Since 2016, the UK Government has increased funding for VAWG by £100m. NLCF described mental health services and women's empowerment as issues which have tended to attract less funding but are also in high demand.

Small and specialist organisations tend to reach some of the most vulnerable women but can struggle to obtain funding. Funders emphasised that smaller organisations often needed dedicated outreach and to know that they are welcome to apply to funding opportunities. However, it is a big risk for a small organisation to commit time to a competitive bid for funding. To counter this imbalance, several funders have focused on building and sustaining closer relationships with grantees and provide "funding plus" support alongside their grants to build organisations' confidence and capacity.



Grantees report a preference amongst women and girls' funders for innovative or novel approaches to issues. Organisations providing proven, well-established approaches e.g. one-to-one counselling, drop-in services or key worker support, described having to 'dress up' their work in shiny new packages, despite the 'bread and butter' work they do being in high demand. Funders who are willing to support tried and tested initiatives, offer an alternative to this.

Independent funders interviewed for this review described the women and girls funding sector as 'patchy', not always working in a coordinated fashion. While some funders have shifted towards more core or flexible funding, project-specific funding is still the norm. This can be limiting and lead to charities funding costly overheads through their own reserves. This was specifically mentioned in relation to rurality, with funders often failing to consider the additional costs associated with serving more dispersed communities.

3.2 Covid-19

The Covid-19 pandemic has added additional pressures for many women and girls in the UK, and for organisations that support them. Since March, [Agenda](#), funded by Pilgrim Trust, and [The Women's Resource Centre](#) have both published reports on the state of the sector and those it serves. Key findings included significant negative impacts on mental health on staff and service beneficiaries, and an increase in demand and complexity of need, with small organisations especially struggling to respond and to plan their sustainability past the short-term emergency funding that has been on offer. Covid-19 seems to presage a future in which there will not only be less funding around, but increased demand for services, a combination which worries organisations working with those facing most structural disadvantage.

The pandemic has also precipitated some positive developments in the sector, including more collaborative working and rapid digital adaptation. The Black Lives Matter movement and the disproportionate impact of Covid-19 on Black, Asian, and Minority Ethnic (BAME) groups, have also increased funding for projects targeted at these communities, and on cases of multiple marginalisation. Funders have also responded by reviewing their own practices and implementing new initiatives, such as actively recruiting staff who are women of colour, co-producing projects with BAME women and girls, and considering how their application processes can be made more accessible.

Covid-19 has left the funding landscape increasingly 'uncertain.' Traditional sources of charity income, including fundraising events, vanished almost overnight; there are fears that charities without sufficiently diverse income streams will be unable to weather the storm. **Some funders have responded by being more flexible, with a greater willingness to provide core or unrestricted funding.** This has enabled organisations to adapt to changing circumstances. Esmée Fairbairn and the National Lottery Community Fund are praised for their flexibility by grantees, for allowing them to make essential adjustments to services and redefining outputs and outcomes, without being tied to pre-existing grant agreements. Unrestricted funding shows trust in organisations, enabling them to 'get on with what they do best' **As statutory sector funding often lacks this flexibility, or tends to be focused on single issues, independent funders can helpfully enable voluntary and community organisations to address holistic and emerging needs.**



3.3 Funder strategies

Many funders working in the women and girls' sector are currently updating, or have recently updated, their strategies. They have in common an increased focus on funders' learning from grantees, changes in governance and the development of programmes designed to trial methods of influencing systemic or structural change. We highlight seven emerging trends.

(1) Intersectionality

One definition of intersectionality, offered by the [Department of Health and Social Care](#), is as 'a tool for analysing how different forms of oppression (e.g. ageism, racism, sexism, ableism, heterosexism, classism) interact and intersect to influence lived experiences. It has come to be recognised as an influential feminist approach for making sense of how inequalities manifest for individuals and groups.' The need for a more strategic, intersectional approach has been accentuated by the disproportionate impact of the current Covid-19 pandemic on BAME women, who are likely to experience both racial and gendered disadvantage. Women who face multiple disadvantages need services that understand how these aspects interact and often exacerbate each other. Taking an intersectional approach means funders' supporting organisations which specialise in reaching those most in need and offer holistic services.

(2) Systems change

Funders' increasing interest in systems change is also about approaching the structures that underpin disadvantage and the support needs of women and girls. [Lankelly Chase and New Philanthropy Capital](#) define systems change as aiming 'to bring about lasting change by altering underlying structures and supporting mechanisms which make the system operate in a particular way. These can include policies, routines, relationships, resources, power structures and values'. Funders described their frustration of having to work around, or accommodate, existing systems and structures which disadvantage women and girls, rather than transforming them. Lankelly Chase is well-known for its focus on systems change; other funders such as [Lloyds Bank Charitable Foundation \(LBCF\)](#) and Smallwood Trust, are also exploring their approaches. Funders applying a systems change lens to their work are looking to **invest in ways which impact on the structural causes of disadvantage** faced by women and girls (as well as other groups) and not just funding service provision.

(3) Operating as a learning organisation and learning from grantees

Funders emphasise the importance of learning from their stakeholders and grantees when undertaking strategy development. **Funding plus** is one established approach to enhancing the relationships and support funders offer their grantees, first described by the [Institute for Voluntary Action Research \(IVAR\)](#) in 2011. Lloyds Bank Community Foundation has arguably become the leading proponent of a funder plus approach, particularly supporting smaller charities. They offer skills-development resources to charities they fund from a list of approved providers, as well as drawing on skills from Lloyds Bank staff: mentoring, skills exchanges on shared problems, different ideas to address common problems, trustee recruitment and development. Building long-term relationships are key to this.



(4) Governance and diversity

Several funders emphasised **the work they were doing to reflect internally their values as part of their own strategic development**. For example, Rosa Fund's Head of Grants described their commitment to being a women-led funder: 'We're chaired by a woman, with a predominantly female board, and an all-women staff team – it's important to mirror the organisations we support'. Smallwood Trust's Chief Executive spoke about more intentionally 'adopting a gender lens in all of our work, not just funding [...] making it very intentional that this is core to our organisation'. Lloyds Bank Charitable cited the [new DEI \(Diversity, Equity, and Inclusion\) coalition for charitable foundations](#) as one resource where they and others look for guidance. In 2019, [LBCF released an Equality, Diversity, and Inclusion plan](#) which included specific, measurable goals for making improvements in different areas of their work in 2020.

(5) Applications

LBCF's [Reaching Further](#) strategy promises to "put the needs of small and local charities at the centre of our work and be a real partner to them." This required ensuring that the whole process of applying for funding demonstrated this ethos, including launching a website that would make the process of applying for funding seamless and transparent. Charities can now check their eligibility quickly using a web tool and receive an instant indication of whether they can apply for funding, and for what amounts. Alongside its new strategy, Esmée Fairbairn has also introduced a new application process to make it quicker and easier for organisations to find out if funding from the Foundation is a possibility.

(6) Outcomes, measurement and reporting

In addition to streamlining application processes, funders have also been looking at lighter-touch reporting, giving grantees more flexibility and control about how they define their outcomes. The culture of traditional grant making and reporting against agreed outputs and outcomes is so ingrained in many charities that funders' putting the onus onto grantees to define outcomes has not been an easy change to make. [IVAR's current project on sustaining simplified funding beyond the Covid-19 crisis](#) brings together a network of trusts and foundations which is integrating the light-touch, flexible funding approaches that have been used during the pandemic into longer term practice. The core principles behind this approach to simplification are: unrestricted funding, streamlined reporting and application processes, and developing trusting relationships with grantees, whilst being proactive in offering financial and other support.

(7) Collaborating effectively

Partnership working encompasses both funders collaborating with each other and funders partnering their grantees and other organisations in the sector. Smallwood Trust sees opportunities for smaller funders to come together to bid to distribute larger funds to women's sector organisations, such as a share of unclaimed assets. Small funders could 'help distribute these bigger funds for bigger change', as experts in reaching and funding the women's sector. Working to distribute larger funds also keeps funders from being competitors with the organisations they fund and spreads the risk of managing large contracts across the partnership.



4. Summary recommendations

The following summary recommendations outline how the Pilgrim Trust can articulate its particular place and role within a diverse funder community; maintain and act on an up-to-date understanding of rising and increasingly complex social needs, as well as capture and better communicate the impact of its social welfare grant funding.

Strategy - focus the bulk of your social welfare funding on supporting systems change which tackles structural inequalities experienced by women and girls	
Why? • Communicates a strategic approach • Complements early intervention – ie focus on causes more than effects • Lends itself to collaboration with other funders and the growing interest in the intersectionality of issues	How? • Develop a new prospectus and strategic framework • Rewrite guidelines • Revise website & social media presence • Reach out to other sector funders
Governance – apply a Diversity, Equity and Inclusion lens to all aspects of your work as a funder of social welfare initiatives and those experiencing multiple disadvantage	
Why? • Reinforces your strategic intent to tackle structural changes • Identifies how the Trust's work can be far more than just its grant-making • Provides an opportunity to reset the Trust's social vision and mission	How? • Apply tools/support developed by ACF • Build more beneficiaries' knowledge and experience into your grant-making • Consider ring-fencing % of your funds for BAME-led women's groups
Operations – develop the Trust's roles and reputation as a relational funder by focusing on greater engagement with and between grantees – building more of a specialism	
Why? • Increases the Trust's understanding of needs and sector trends • Builds the Trust's capacity as an enabler of learning and an influencer • Provides more opportunities to identify, measure and showcase the impact of effective interventions	How? • Fund fewer, larger, longer-term grants; Consider working with/via an intermediary • Ringfence money for evaluation • Develop an appropriate PT "funder plus" offer with trustees • Make use of ICT to network and support your grantee community

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