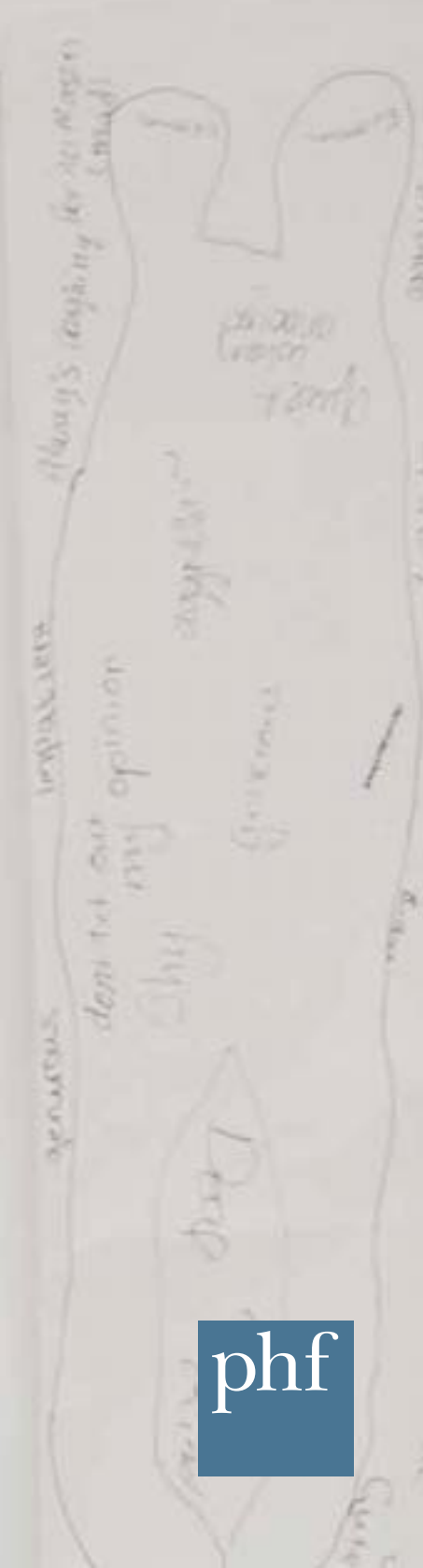


Paul Hamlyn Foundation

Yearbook 2013/14



Cover:

Young people taking part in the National Theatre's Young Studio programme, a scheme to support young people to develop skills in theatre, including acting, directing, writing and design.

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Chair's statement

Towards our next chapter

This year we have been laying the groundwork for the next phase of the Foundation's life.

The staff at the Foundation and the trustees, together with many friends and colleagues involved in our main areas of activity, have been reflecting on our work over the past decade and considering possible priorities over the coming years.

Our desire to listen and learn has involved opening the Foundation up to suggestions, prompts and provocations from many different quarters. Not surprisingly, we've received many more ideas about what PHF might do, and issues we should consider investing our time and resources in, than we will be able to take forward. I was struck by how strongly one theme in particular resonated across many of the contributions – the paramount importance of the independence of the Foundation.

This independence enables our team, advisors and trustees to work with and support individuals and organisations who, driven by their desire to open up opportunities of different kinds for people in the fields of the arts, education and social justice, are involved in different ways of working in sometimes difficult or challenging areas. It brings particular responsibilities that, as we make choices about our future direction of travel, we will continue to keep uppermost in mind.

In parallel with our strategic review, we have of course continued our grant-making programmes and initiatives. At the beginning of the year, we made two final 25th Anniversary gifts that reflected my father Paul Hamlyn's interests: to The Reading Agency to support their inspiring work to improve literacy, and to five performing arts venues across the UK to develop Paul Hamlyn Clubs to broaden their audiences over the next five years.

Our programme in India has completed its first full year of operation under its new strategy. This focuses on making a tangible difference to vulnerable groups, such as the many thousands of 'railway children' who run away from home

and gravitate towards railway stations where they are often particularly vulnerable to many forms of exploitation.

The other theme I picked up from our consultation process was the widespread recognition of the integrity of the Foundation. This quality is shared amongst our hugely committed staff, advisors and trustees, and equally importantly, amongst all the individuals and organisations we support, many of whom are working on challenging programmes with extraordinary determination.

I am particularly grateful to our staff during this busy year. We appreciate the contribution of Martin Brookes to the development of our new strategy during his year as Director and we wish him well as he pursues fresh challenges. Two long-standing members of staff deserve special mention. Faye Williams and Susan Blishen left the Foundation this year after 22 and 15 years respectively, and I am very grateful for their sustained commitment over these years.

This Yearbook marks the last full year of work before the launch of our new strategy. It aims to show some of what has been achieved and learned as we prepare for the next chapter in the life of the Foundation.

Jane Hamlyn
Chair

Paul Hamlyn Foundation

Mission

To maximise opportunities for individuals and communities to realise their potential and to experience and enjoy a better quality of life, now and in the future. In particular, we are concerned with children and young people and with disadvantaged people.

The objects of the Foundation are to further such charitable purposes and to benefit such charitable institutions as the trustees see fit.

Values

In line with our founder Paul Hamlyn's values, we believe in giving opportunities by realising people's potential and in fighting prejudice.

We are interested in finding better ways to do things and help organisations to sustain and develop their work. We pay particular attention to long-term issues. We are not afraid to address issues which others may find challenging or unpopular. Whilst being willing to work in partnership with government, we are also prepared to challenge its (and other people's) established thinking. We believe independent foundations have an important role to play in society.

Strategic aims

Our strategic aims are:

1. Enabling people to experience and enjoy the arts.
2. Developing people's education and learning.
3. Integrating marginalised young people who are at times of transition.

In addition, we have three related aims:

4. Advancing through research the understanding of the relationships between the arts, education and learning and social change.
5. Developing the capacity of organisations and people who facilitate our strategic aims.
6. Developing the Foundation itself to be an exemplar foundation, existing in perpetuity.



Arts programme – page 12



Education and Learning programme – page 22

Programmes

We seek to achieve our first five aims by establishing three partly overlapping programmes for our work in the UK: arts; education and learning; and social justice. Themes and priorities within each programme may change over time. Each of the three programmes has an Open Grants scheme and Special Initiatives, the latter targeted at issues we particularly want to address to achieve long-term improvements in society. We have a separate programme for our work in India.

We expect the programmes and the work we support to have an impact at the levels of individuals and communities, organisations, and policy and practice.

Grant-making information

Full information on the objectives of each programme, their themes and priorities, eligibility and assessment criteria, application and grant-making processes is available on the Foundation's website. Eligible applicants are asked to send a first-stage application to the Foundation via our website. For further information, please see www.phf.org.uk.



Social Justice programme – page 32



India programme – page 42

Director's report

Continuity and change

The main features of our grant-making programmes are detailed elsewhere in this Yearbook. As the chair's statement indicates, this has been a year of continuity and change; of initiatives pursued and new plans laid.

This Yearbook charts an eventful year, notable both for the continued work of the Foundation's range of grants programmes and Special Initiatives, and the steps taken towards developing a new strategy. This juxtaposition of 'business as usual' with reflection on the past and contemplation of a different future creates challenges for any organisation.

Through its Special Initiatives the Foundation gets closely involved in the delivery of work. Several Special Initiatives reached important points during the past year. Within the Social Justice programme, the Right Here initiative on young people's mental health, delivered in partnership with the Mental Health Foundation, concluded its work with four local projects around the UK. The final evaluation is due later this year but there is already a strong sense that the initiative has had an impact and leaves a lasting legacy for the local participants and for wider practices.

Within the Arts programme, we agreed a second allocation of support for the Breakthrough Fund, an initiative that provides support to individual 'cultural entrepreneurs' at key moments in their careers. The fund is distinctive for its selection processes and the flexible funding it provides. Of course, the Foundation has a long history of supporting individuals within the arts. This coming year will see the 20th anniversary of the Awards for Artists, through which PHF has recognised individual artists and provided a level of no-strings funding that is rare and valued.

Elsewhere, the Foundation continues to support schools and universities through initiatives within its Education and Learning programme. Several of these initiatives are long-standing, most notably Musical Futures.

In the India programme, this was the first year of a new strategy with a focus on 'lost childhoods' and

the lives of so-called railway children. In Bhopal in February we took the first steps towards bringing together organisations to share experiences, learn from each other and consider how this difficult problem might be tackled more effectively.

Strategy review

Its new strategy makes the Foundation's India programme different from its work in the UK. During this year we began the tough thinking about developing a new strategy for the other programmes. This has included open conversations with staff, trustees and advisors.

We wanted to get as many people as possible involved with a new strategy, on the basis that the choices we make can only be as good as the ideas we have to choose from. To this end, we invited people to complete the statement 'PHF should...'. We published a number of the contributions on a blog during the year¹. Many good and provocative ideas surfaced through this device.

The mechanism served a further purpose of signalling openness. The Foundation has a reputation for being open, but it can build on and extend that. How we think, how we learn, how we assess – if it becomes increasingly open on these fronts, this will help people to apply to the Foundation for funding and provide greater opportunities to influence behaviour.

PHF was one of the first UK foundations to commission the US-based Center for Effective Philanthropy to undertake a Grantee Perception Report (GPR). Our second GPR and, also, an Applicant Perception Report (APR) both reported this year. These mark PHF out as the first UK foundation to undertake the GPR twice and the first to undertake an APR².

The results of these surveys are helpful inputs into a new strategy. A key feature of the GPR results was a call from grantees for PHF to do more to bring them together to share lessons and insights. This type of activity will feature strongly as an element of a new strategy. The APR highlighted the need to do more to explain why applications are rejected, and we took steps to improve feedback to unsuccessful applicants.

1 www.phfshould.wordpress.com

2 Summary findings from the latest GPR and APR can be found on our website

Managing change

As well as change, it is important to stress the elements of continuity in a future strategy. The Foundation has deep roots in the areas it funds and in the values of its founder, Paul Hamlyn. Once the Foundation has agreed the details of a new strategy, these changes will be explained clearly to all stakeholders and introduced thoughtfully, so as to minimise any disruption or burden on organisations applying for funding.

Maintaining an ambitious programme of grant-making and Special Initiatives alongside thinking about and planning for a new strategy is a tall order. Credit for managing this lies with the staff, supported by trustees. I would also like to record thanks to the numerous advisors and consultants to the Foundation. Their input is enormously valuable as they help steer discussions and decisions. During the past year there were some changes to the advisors on the Education and Learning Programme Committee, with Vanessa Wiseman stepping down and both Anita Kerwin-Nye and Alasdair Macdonald joining.

Alongside its endowment, the Foundation's people and the relationships they manage are its main strengths. The Foundation is now past its 25th year. It can prepare for the future confident in its values and strengths.

Martin Brookes

Director (to July 2014)

Strategy review process



Our work reviewing strategy has been a major theme of the year. The process of strategy development has been fluid, taking place at various levels and locations, physically and virtually. We have sought input from grantees and partners, friends and critics. And we have tried to learn through the process about how we can be a better foundation.

Our new strategy, to be launched later in 2014, will say a good deal about openness, transparency and a desire to learn. In that spirit, we publish here some highlights from the process and outline some of the ingredients that have contributed to our thinking.

What we have done

'PHF should...' – external perspectives

Between September 2013 and January 2014 we ran an initiative called 'PHF should...', in which we invited input to our strategy review from a range of stakeholders. The primary aim was to generate ideas for consideration as part of the review and to begin conversations about the shape and direction our work could take in future. The concept was simply that participants should complete the statement 'PHF should...' and send it to us.

We set up 'PHF should...' to open up our strategy review. It produced more than 80 detailed contributions and prompted hundreds of smaller pieces of activity on social media. Several led to more in-depth conversations offline, and analyses of the data received have played an important part in our internal debates about future strategy. We published about half of the responses on a blog (www.phfshould.wordpress.com), where they can still be read and commented on.

Findings

At its broadest, the content received can be divided into suggestions about what we fund, and suggestions about how we fund. Both are instructive for the new strategy. Many contributions made cases for support for particular issues. For example, perhaps unsurprisingly given our areas of focus, young people emerged as a strong theme across contributions considering all kinds of aspects of our work. Contributions from people involved in Special Initiatives were quite common – often urging the continuation of aspects of this work, or proposing new activities building on the achievements of initiatives to date.

Others were more general in considering our approach to funding. Examples include the notion of the Foundation as 'convenor', using its influence and networks to bring people and organisations together to share learning and experiences; the importance of impact and evaluation to our work; and styles of funding such as long term vs short term, relationship vs project-based funding, and the funding of individuals.

There was discord around the issue of innovation – an area on which we placed considerable weight under our last strategy. While some contributors indicated that they favoured a focus on innovative work, others argued that this should not be at the expense of funding to scale up work, or simply to maintain organisations' work amid difficult financial circumstances.

Internal – staff and trustee meetings

'PHF should...' was only the most public part of a wider process. In parallel to external conversations was a series of internal activities in which trustees and staff held wide-ranging conversations about how the Foundation works and what could be improved. These sessions were deliberately fairly unstructured but took as their starting points a set of five key issues: PHF's values; its assets; its voice and influence; its programmes; and its grant-making.

Within each area we sought to bring a range of internal voices to the table to try to obtain, collectively, a deeper understanding of the issues at stake. In the first group, for example, we worked together towards developing a fresh articulation of the Foundation's values, seeking to make them clearer so that the new strategy can easily be located within them. In 'Assets', developing an exhaustive list of the tools available to us to effect change was a useful step before next being able to consider how best to 'sweat' those assets to have maximum impact. Aside from the endowment, our people, intellectual capital, relationships and the physical



PHF staff and trustees, and young people from 12 grantee organisations, share ideas at the PHF Young Leaders' Day in November 2013.

space we inhabit, were all among the assets that we might seek to exploit more in order to achieve more in our mission and increase the benefit we bring to our clients and their beneficiaries.

Young Leaders' Day – young people's perspectives

As mentioned, a clear theme within the 'PHF should...' contributions was work with young people. Supporting young people has been at the heart of the Foundation's values since the outset. The Social Justice programme has worked consistently to ensure that young people's voices are heard, and our principle of participation, which has been a strong current within Open Grants funding, is rooted in the belief that beneficiaries should be active participants in decisions that affect them, rather than passive recipients of work designed to help them. It is therefore fitting that a deliberate focus on young people should form part of the activity surrounding our strategy review.

A team of staff volunteers worked with 12 grantee organisations from the three UK programmes, alongside young people working with each of the organisations. The event was led by a team from Creative Experts, who are part of PHF Arts grantee Contact in Manchester. The day aimed to generate answers to the question, 'How can PHF improve opportunities for young people?'; enable participating young people and grantee staff to learn from each other and have fun; and experiment with working directly with young people supported by PHF grants.

Haz, a 15 year-old peer mentor from Arc Theatre, a grantee based in East London, wrote afterwards: "I thought it would be PHF people sitting around a table in suits and we would be asked about our progress and what we think our projects are doing for us. But no, this wasn't the case at all! Eleven other companies were taking part in the day and everyone was so involved... I feel the day educated us all: we helped one another develop ideas on how we can do more by working together, both on the day and onwards."

“I thought it would be PHF people sitting around in suits...”

By Haz, Peer Mentor, Arc Theatre

Hi, I'm Haz. I'm 15 years old (nearly 16!) and I'm a peer mentor with Arc Theatre in Barking and Dagenham. At Arc we tackle subjects such as sexual exploitation, girls in gangs, sexting and sexual abuse.

In a sense you could say I've grown up with Arc. In the last two years they have changed me and opened my eyes, and I feel, now, wiser, and more confident. The work with Arc has impacted on me, my friends and others around us. Arc gives us an opportunity to be heard – as clichéd as that sounds! No matter what, we will continue to let our voices be heard on issues that affect us, because we are making a difference.

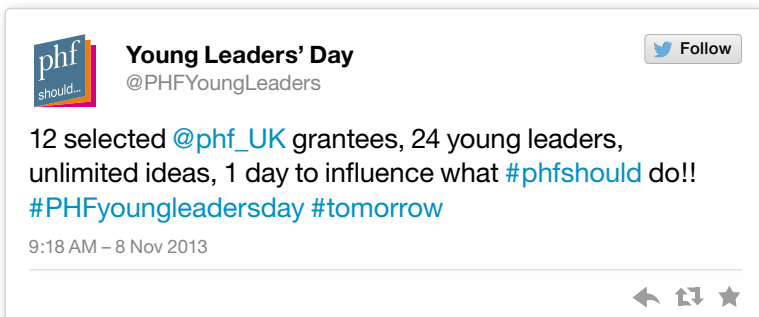
On Saturday 9 November my friend and I went to the Paul Hamlyn Foundation Young Leaders' Day. When I was first told about it, I thought it would be PHF people sitting around a table in suits and we would be asked about our progress and what we think our projects are doing for us. But no, this wasn't the case at all! Eleven other companies were taking part in the day and everyone was so involved. While at the start it was a bit nerve-wracking, by the end of the day we were all one big happy family. I feel the day educated us all: we helped one another develop ideas on how we can do more by working together, both on the day and onwards. In one way or another, all of us had things in common. We all shared an aim: to make a change.

A number of trustees attended the event, held during a weekend at our offices in King's Cross. A film of the day was made by another of the participating organisations and, at the request of young people sitting on the steering group for the event, we produced a pack outlining funding and other opportunities for young people.

Other ingredients

In working on our new strategy we have also drawn on existing relevant research. The impact assessment of our former strategy, looking at outcomes from grants between 2007–12, which we published in 2013, provided an important backdrop for considering how we have made a difference, what outcomes we are able to effect, and how we can better consider outcomes measurement under the new strategy. From this exercise it was clear that we have historically had more impact in some areas than others – notably that we have had less impact on practice and policy than we sought under our old strategy, despite some notable successes. As the Impact report in this Yearbook shows, we also need to ensure that our systems for measuring outcomes, and crucially the capacity of grantees, improve if we are to be as effective as we wish.

We also have a trove of data on our effectiveness relative to other foundations, thanks to the Grantee Perception Report we received early in the year. As well as establishing some benchmark data for our performance under the new strategy, it highlighted some areas for improvement in our operations.



@PHFYoungLeaders Twitter, November 2013

Conclusions

The various activities described here did not happen in a neat sequence, but overlapped, clashed with each other and competed with the Foundation's ongoing activities. It is important to note that in many respects the activities represent starting points for further work and development. Not every conversation has been neatly wrapped up, and we have not discovered all the answers. The new strategy will not reflect directly every suggestion sent to us, but a number of themes picked up through the course of the year will continue to be discussed in the background, and may materialise in future work.

What does this all mean for our future strategy?

Regarding what we fund, this clearly raises a number of difficult decisions. In conversations, through 'PHF should...' responses, and internally, all areas of our work, and many areas where we have not worked historically, have been discussed and in many cases passionately and eloquently advocated. Yet data such as the GPR and our own impact assessment indicates that we have not been able to generate the outcomes we have sought in every area, which may suggest overstretch. The strategic review has been an opportunity to think differently and define tighter goals. Sometimes you have to do less to achieve more.

Perhaps the most important and radical changes may be to how we fund. Building on the successes of our previous strategy, but recognising where we need to improve, we want to make a big leap in terms of our processes and how we build learning into what we do. We will seek to be more open about what we do and communicate more about what we learn. This will require us to change and will require grantee relationships to change. There will not be a straightforward divide between Open Grants and Special Initiatives – rigidly enforced with capital letters – but instead we want to be more responsive, less one-size-fits-all, and offer a greater range of approaches to achieving our goals.

What's next

At the time of going to print, we are finalising the major themes and funds under the new strategy. Following an announcement later in the year, these will be rolled out gradually and carefully, with due care to enable organisations already applying for funding under the existing strategy to complete that process.

What to expect:

- We will be clearer in our articulation of values and what we want to achieve.
- We will be launching new grants programmes.
- We will be seeking to learn more and share more.
- We will look different online. A new website is in development that will support our new activities and help all our stakeholders to learn from one another.
- We will continue to be active in seeking feedback and dialogue.



One of the discussions at the Young Leaders' Day, facilitated by a team from Creative Experts, part of Contact.

25th Anniversary gifts

We celebrated our 25th anniversary year in 2012/13, making gifts to the Roundhouse Studios, Jaipur Foot and for Circuit, led by Tate. We made two further gifts early this year, for five ‘Paul Hamlyn Clubs’ at performance venues around the country, and to The Reading Agency. Here, we also give details of the first year’s operation of the Circuit programme.

Paul Hamlyn Club Awards

A five-year access and audience development scheme for hard-to-reach people who do not attend live performing arts events

£2,517,567 in 2013/14

In May 2013, we announced £2.5m of awards to five performing arts venues, as one of the Foundation’s 25th Anniversary gifts. Sherman Cymru (Cardiff), Citizens Theatre (Glasgow), Opera North (Leeds), Royal Liverpool Philharmonic Orchestra and Hall for Cornwall (Truro) were each awarded £500,000 over five years to expand and sustain their audiences, with a particular focus on disadvantaged people and communities who do not attend events at these venues.

All five organisations have started to develop their plans through a research and development phase – considering carefully who to target, the nature of the barriers that prevent people from attending, and which community organisations to work with. During this initial phase, potential target groups and local community partners started to emerge.

Ticketing schemes are central to all the Clubs, where free or significantly reduced tickets are made available to members of the target groups, and several approaches and mechanisms have been tested to date.

In December 2013 and March 2014, the members of staff from the five organisations coordinating the Paul Hamlyn Clubs came together – first in Liverpool and then in Truro – to compare notes on their experiences so far. The five Clubs are supported by an evaluator, Annabel Jackson, and a consultant, Kate Tyndall.

The Reading Agency

Support towards additional digital capacity and the Reading Activists programme

£1,000,000 in 2013/14

We announced our final 25th Anniversary gift, of £1m to The Reading Agency, in July 2013. The Reading Agency works to inspire people to read more. It believes that confident and skilled readers have greater aspirations and opportunities, and that reading brings enjoyment and increases wellbeing. Our gift was to expand and develop The Reading Agency’s digital capacity and its Reading Activists programme, which enables young people to volunteer through their local libraries to encourage other young people to read more.

The Reading Agency is in the process of developing a new digital strategy and improving the content and capacity of its websites to engage with readers for its Summer Reading and Six Book Challenges. In partnership with libraries, the Summer Reading Challenge helps to motivate primary-age children to read for pleasure during the summer, helping to prevent the summer dip in literacy skills noted by teachers. The Six Book Challenge aims to build the reading confidence and motivation of adults who struggle with reading.

The Reading Activists programme uses reading and libraries as a springboard for community activism. The Reading Agency supports young people (aged 11–24) from deprived communities to set up reading and writing groups. The aim is to build an enjoyment of reading among people of all ages, through organising creative events and participating in social action. Through volunteering, the Activists develop their own skills, confidence and employability. In 2013/14, our funding has enabled The Reading Agency to research and design a new Reading Activists Challenge and specific website to increase its engagement with young people. These will be launched during 2014.

Circuit

A national programme connecting 15 to 25 year olds to the arts in galleries and museums, working in partnership with the youth and cultural sectors.

Circuit was launched through an Anniversary gift of £5m made in 2012/13.

Led by Tate, Circuit provides opportunities for young people to steer their own learning and create cultural activity across art disciplines in eight locations across the UK. These include Cambridgeshire (Wysing Arts Centre and Kettle's Yard), Colchester (firstsite), Liverpool (Tate Liverpool), Llandudno (MOSTYN), London (Tate Britain and Tate Modern), Manchester (Whitworth Art Gallery), Nottingham (Nottingham Contemporary) and St Ives (Tate St Ives). It is designed with and for young people.

The core values of the programme are about making a positive difference for young people, allowing them to develop ownership, agency and authenticity in the work they do, and promoting social, cultural and creative diversity.

Its aims are to work with and for young people to: increase cultural access and opportunities; to build sustainable partnerships between the arts and youth sectors; to change practice within and across cultural organisations; and to improve attitudes and behaviour towards young people.

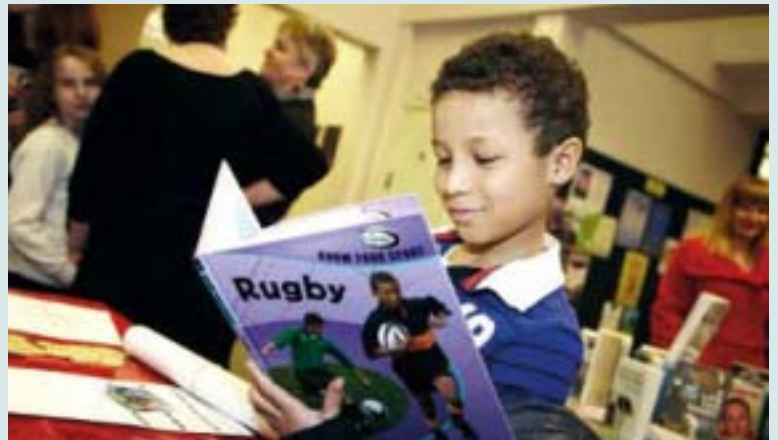
Research and evaluation are crucial to Circuit's aims and a range of data has already been captured to improve understanding of the profile, motivation, demographic, satisfaction and learning experiences of participants and audiences.

Fourteen staff have now been recruited across the Circuit sites to work on this four-year £5m programme. Key achievements in 2013/14 include 244 young people developing projects and events for other young people, the Circuit website going live, and 108,803 participants engaging through digital programmes. A total of 21,251 audience members engaged in Circuit events, with 13,696 people participating directly through projects, workshops and events steered and developed by young people. Circuit now has 87 youth and cultural organisations involved in research, dialogue and delivery.



Paul Hamlyn Club Awards

Families taking part in music at the Liverpool Philharmonic Hall.



The Reading Agency

A book selection during the 2013 Rugby League World Cup Six Book Challenge.



Circuit

Artwork created at COLLABOR-8 at Nottingham Contemporary in August 2013. Part of Circuit, this event saw young people making art inspired by eight works from an exhibition at the gallery curated by artist Mark Leckey.

A scene from 'Glasshouse' by Kate Tempest, a play about three members of a family struggling to stay together. Produced by Cardboard Citizens using forum theatre, a type of theatre in which audience members can stop scenes and enter the stage to act out alternative scenarios to reach more positive conclusions, the show toured hostels, day centres and prisons. Cardboard Citizens is a theatre company that employs actors with experience of homelessness.

Arts





Arts programme Report

Arts and culture have shown great resilience during 2013/14, despite an ever-changing landscape.

Most local authorities have continued to cut cultural provision as part of their broader reductions of key services this year. Some arts organisations have become gradually leaner over the last few years and are now somewhat emaciated. Not many arts organisations have closed down yet, but we fear this is likely to change over the year ahead.

National public arts funding is also in flux. Creative Scotland launched its new ten-year plan for the arts, screen and creative industries – *Unlocking Potential Embracing Ambition*. Arts Council Wales continued its Inspire consultation to map out the themes that are important to creativity and the arts in Wales.

Arts Council England's announcement of the total amount it will invest in arts and culture over 2015–18 coincided with a call for applications for national portfolio status. The number of regularly funded organisations will be smaller to reflect a reduced core funding allocation and the need to make space for newcomers in the portfolio. We saw a drop in applications during this period as many organisations justifiably focused on the core support on offer from ACE. It is likely that after the national portfolio decisions are announced, many organisations will have to depend on lottery project funding (such as grants for the arts), which is a less stable source of funding, and which is mostly project-based. We are concerned about the potential repercussions for the sector from these changes during 2014.

Cultural learning

A further threat to the arts and culture in England has been in the education sector. The government's announcement of the English Baccalaureate school accountability measure in England excluded arts and culture as key performance indicators. The GCSE and A Level reform looked like it may have restricted young people wanting to choose arts subjects. The new National Curriculum for England, which will come into force in September 2014, also

marginalised arts and culture. Despite attempts to reassure from the Education Secretary Michael Gove, and the then Culture Secretary Maria Miller, one immediate impact appears to have been a 14 per cent drop in arts GCSEs in the summer of 2013.¹

The Cultural Learning Alliance, which we have supported since its inception, spearheaded a campaign on many of these fronts to counteract the effects that the current trends could have on children and young people. Eight education consultations in 12 months resulted in some victories, such as drama remaining within the English curriculum. Also, arts subjects have been included in the first round of reformed GCSEs to be taught in schools from September 2016, alongside the sciences, geography, history and languages. But there were also some disappointments, such as film and the concept of 'contemporary' not being included in arts subjects.

To ensure that we have a society where arts and culture are valued and where artists can thrive, we feel passionately that we must protect the entitlement of all children and young people to access culture.

While Maria Miller did acknowledge publicly at the beginning of 2014 the importance of promoting the arts alongside sciences, technology and engineering – reflecting the values of the 'from STEM to STEAM'² movement – it is unclear at the time of writing whether this idea is gaining traction within the Department for Education. We will work alongside others to promote this agenda as it feels particularly important to us at this stage. We welcomed Michael Gove's April statement about his determination to ensure that every child enjoys access to the best in our culture and that all schools nurture creative talent, but we look forward to finding out how this commitment will be made tangible.

Advocacy

In addition to our support of the Cultural Learning Alliance, we are one of a small group of funders to underpin What Next?, a movement now comprising over 20 'chapters' throughout

1 Source: Cultural Learning Alliance

2 STEAM: Science, technology, engineering, arts and maths

the UK. This self-organised group of senior arts and culture professionals aims to engage everyone in Britain in a conversation about the value of arts and culture. The group's ambition is to shape a future where arts and culture are at the heart of society, and it is trying to find new ways to talk about, influence, shape and change our country's cultural landscape. Apart from the obvious fit with the Foundation's ethos and values, we are interested in whether What Next? can be a catalyst for fresh thinking and new policy ideas.

The *Defining Values* seminar series was initiated in 2011 under the aegis of National Arts Strategies (US) in response to the desire among UK arts leaders for fresh thinking about fundraising and income generation. This was in the context of politicians' pleas for organisations to 'get more American' in their approach to fundraising. The premise is that leading arts organisations of differing scale are already tapping into the most obvious routes to support, and it is through the creation of new value, rather than new fundraising techniques, that strategic breakthrough is possible. The initial seminar took place in London in October 2011 with a follow-up session six months later in March 2012. This year, we joined the Esmée Fairbairn Foundation and NESTA's Digital R&D Fund to support three sessions in Newcastle and one follow-up session in London.

It was interesting to put the values and methodologies of participatory arts practice in the spotlight as an asset in the context of fundraising. Learning and participation activities are rarely seen as a prism through which to examine how external relationships are managed, including those with funders and supporters. The feedback from the Newcastle sessions seems to indicate that this is a valuable model that could be developed further.

Our own arts participation initiative, ArtWorks,³ which looks at ways to improve the professional development of artists working participatively, is moving on to an advocacy footing. Following a year of consolidating the evidence and experience gained to date, we have started to implement our advocacy and dissemination

strategy to broaden the reach of this important action-research initiative. Our focus has also shifted towards the best ways of embedding the work and making it viable after the end of the grants made under the scheme, in the autumn of 2014.

Following an interim review of our Breakthrough Fund initiative, £3m was allocated for two more rounds of applications.⁴ The Fund reflects our commitment to a healthy arts ecology through our desire to support people who have what it takes to make things happen. It also explores an interesting territory between support for the individual, the vision and the organisation that delivers this. The funding relationship acknowledges the defining impetus and interplay of each of these elements, but focuses on the individual at the heart of the picture: the individual and the vision they propose provide the central rationale for the grant. This remains unusual among other private arts funders.

The year ahead

Putting into place and beginning work under the new Foundation strategy will form the core of our activity in the coming year. The arts remain of crucial importance to the Foundation as an end in themselves, and as a means to provide support to individuals and communities. We have given serious thought during our strategic review to the question of how to have the greatest impact we can in this area. Alongside the work of the new strategy, we will continue with our ongoing initiatives, and the three new schemes we announced last year as part of our programme of 25th Anniversary gifts. Circuit, the Paul Hamlyn Club Awards, and The Reading Agency's 'Reading Activists' programme have all started work this year. Each is making good early progress towards achieving its goals.⁵

Régis Cochefert
Head of Arts

3 See p.17

4 See p.16. Details of previous recipients and the interim evaluation are published on our website

5 See pp.10–11

Arts programme

Special Initiatives

Awards for Artists

Support for individual visual artists and composers

£452,858 in 2013/14

The Awards for Artists scheme supports individual artists to develop their creative ideas by providing funding with no strings attached over three years. The Awards are made on the basis of need, talent and achievement. In 2013, awards of £50,000, paid in three annual instalments, were made to eight recipients:

Composers:

Emily Hall, Bryn Harrison and Chris Watson

Visual Artists:

Margaret Harrison, Stewart Home, Torsten Lauschmann, Cally Spooner and Ian White

Ian White sadly passed away in October 2013. In accordance with his wishes, we are using part of his Award to support a group of seven artists selected by Ian, and another part to contribute to an ongoing legacy of his work.

The 2013 Awards for Artists reception was held at the Foundation offices in November. Our guest speaker was Jonathan Reekie, who stepped down in 2013 after six consecutive years as chair of the panel of judges for the Awards for Composers. Previously CEO of Aldeburgh Music, he is now Director of Somerset House.

2014 will mark the 20th anniversary of the Awards scheme.



The 2013 PHF Awards for Artists recipients, from left: Torsten Lauschmann, Chris Watson, Cally Spooner, Margaret Harrison, Emily Hall, Stewart Home, Bryn Harrison. Absent: Ian White (1971–2013). (Photo: Emile Holba).

Breakthrough Fund

Funding for visionary cultural entrepreneurs

£1,860,397 in 2013/14

The Breakthrough Fund aims to identify outstanding individuals in the role of cultural entrepreneur, working in a variety of art forms and contexts, who have compelling visions and are at a timely moment in their careers. Through committed, responsive and flexible support, the Fund aims to unlock significant developments and outcomes that would not otherwise be brought about. It also helps achieve transformational impacts for these individuals and their organisations.

In three rounds of funding between 2008 and 2010, 15 grants were made totalling £3,879,765. Nine of these grants have now completed; most of the six remaining grants will complete in 2014/15. Consultant Kate Tyndall is continuing to lead the ongoing evaluation of these 15 stories and will meet with all grantees two years after the end of our support. The original grants appear to fall in three categories: those that have had truly transformational outcomes; those that made progress, but without the quality of impact originally envisaged; and those that have had a strongly positive impact.

During 2013/14, in response to the findings of the interim evaluation of the Fund completed in 2012, a new selection cycle started – once more using a process of confidential nomination and then competitive selection. We received 49 nominations from 25 nominators, generating 46 applicants. We asked them to make a short film as part of their application – a new approach that provided a fresh way for them to articulate their visions. The selected grantees are:

- David Agnew/So It Is
- Jimmy Akingbola and Fraser Ayres/Triforce Productions
- Emma Jordan/Prime Cut Productions
- Lizzie O'Neill/Z-arts
- Zeon Richards/Renowned Group
- John Rostron/Sŵn
- Magdalena Schamberger/Hearts & Minds

We had made clear to nominators that we were interested in hearing about exceptional individuals working right across the cultural economy, including the non-subsidised sector. Our seven grants reflect this variety of approach. We look forward to beginning our relationships with these new grantees and to supporting their Breakthrough endeavours.

ArtWorks: Developing Practice in Participatory Settings

A workforce development programme for artists

£267,656 in 2013/14

Launched in 2010, the ArtWorks initiative supports five groups of organisations in Wales, Scotland and England to develop new approaches to the training and development of artists who work in participatory settings, at all stages of their careers and across a range of art forms.

During 2013/14, these 'pathfinder partnerships' consolidated their research to date, which is now documented in seven new Working Papers that we published this year. We will publish a further paper in 2014, drawing together our learning from the point of view of the employers and commissioners of artists working in participatory settings.

A range of approaches have been piloted during the year, including an artists' code of practice, accredited and non-accredited undergraduate and post-graduate courses, a fellowship scheme, artists' labs, peer-to-peer networks, mentoring and placement schemes, shared quality factors, and a BA in arts leadership. The pilot schemes are developed with a view to making them transferable and scalable for the wider sector.

The *Changing the Conversation* conference at Lancaster University, organised with the Higher Education Academy and Creative & Cultural Skills, took place in April 2013. It brought together Higher and Further Education providers, teacher-practitioners and researchers with artists and arts organisations to discuss the needs of artists who work in participatory settings, at different stages of their education and careers.

Following the conference, we invited bids from delegates to explore new ways of working; test new models of collaboration; and generate case studies of how 'the conversation' (about participatory arts) might be changed in practice. Seven projects were funded and these case studies are available on the ArtWorks website.

An Artist Survey, launched to find out more about artists' perceptions of the participatory sector and the opportunities available to them, generated over 1,000 responses. The results will strengthen our understanding of artists' needs and help inform advocacy and dissemination work to improve participatory arts practices.

Our Museum: Communities and Museums as Active Partners

Facilitating organisational change within museums and galleries

£406,035 in 2013/14

Our Museum works with nine museums and galleries around the UK to help them embed community participation at the heart of their organisations.

It has been a difficult year for some of our partners, who struggled with significant financial pressures while going through a process of organisational change to embed and sustain community participation. Despite those difficulties, the year was in many ways a real breakthrough, with some innovative work towards broadening the range of community partners, giving them real authority in taking decisions within the organisations and tackling head-on the barriers to deeper participation. What was particularly notable was the way lessons learned in the first year of Our Museum were taken on and solutions (or a different tack) were found to overcome sticking points. The catalyst for much of this was the first annual peer review, which brought together all the organisations and their community partners in Cardiff in April 2013.

Some of the innovative learning has been captured on a series of videos, which is available online through the Our Museum website (www.ourmuseum.ning.com). These initial videos focus on genuinely pathfinding work by the organisations, such as: developing strategic partnerships with communities; case studies of effective shared decision-making; how to involve governing bodies and persuade them to champion participatory work; and how to achieve staff buy-in to a participatory way of working across a large and complex organisation. We are also developing a stand-alone legacy website to showcase and promote all the learning from the programme.

We practised what we preach at the annual conference of the Museums Association, in Liverpool in November 2013, where community partners from the Our Museum programme ran a session on how museums know their communities, resulting in an action list of what works and what does not. Another session at the conference, on co-production with communities, was also run by Our Museum participants and community partners.

Arts programme

Open Grants scheme

Pallant House Gallery

£48,766 over 18 months awarded in 2007/08, £138,500 over three years awarded in 2009/10, and £50,000 over one year awarded in 2012/13



A session on interpreting collections, given as part of the Step Up training and development programme, part of Outside In.

When Ann Claire was diagnosed with a life-threatening illness, she used art as a way to alleviate her depression. “Art has become my way of obtaining head-space,” she said. “I use it as therapy. I was so pleased to be offered the opportunity through Pallant House Gallery to share my art with people who wouldn’t be judgemental.”

Outside In is a project established by Pallant House Gallery in 2006. It has supported around 5,000 artists who face barriers to the art world, either through health, disability or social circumstance. The project has held 26 exhibitions and three open competitions in the last six years. The last competition, in 2012, attracted 2,300 submissions from artists across the UK. Six artists were chosen to have solo shows at Pallant House Gallery. The 2012 National exhibition attracted over 13,540 visitors.

Pallant House Gallery’s Executive Director, Marc Steene, says: “Outside In is seeking to create a fairer and more inclusive art world, and to create a wider dialogue about culture and understanding of creative purpose. I think we should be wary of seeking to define what art is or who artists are.”

One artist to have benefited from a solo show at Pallant House Gallery is Kate Bradbury. “They have given me a lot of opportunities to exhibit and promote my work,” she says. “By looking at other artists on the website, I realised how many people are out there.”

PHF has now made three grants to Pallant House Gallery. The money has helped the Outside In project to collaborate with 60 arts venues across the UK, from the Royal Academy of Arts in London through to smaller galleries such as Salisbury Arts Centre. It encourages cultural organisations to discover unknown artists in their communities and put their work in mainstream exhibition spaces. It also works with local service providers to reach people who would benefit from the project.

“Colour became the doorway to my creativity after experiencing a breakdown in 2004,” says Kwei Eden, a 2009 Outside In award winner. “Outside In has helped me realise my potential as an artist. It is a bubble of loveliness; you’re in it, believed in and encouraged to feel more valued about your work.”

Outside In also runs a professional development scheme, which has trained 60 artists to become workshop leaders and to be involved in interpreting collections. The course is being formalised with accreditation and online learning. The aim is to get artists with disabilities to play a more active role in museums and galleries.

Independent evaluator, Susan Potter, says: “Outside In has had a positive impact on artists, increasing their confidence and self-esteem, developing new skills and experiences and improving mental health and wellbeing. For Pallant House Gallery and its partners, the project has increased audiences, led to skills sharing and stimulated further creative activity.”

Pallant House Gallery this year announced funding from the Esmée Fairbairn Foundation to continue Outside In for three years.

York Theatre Royal

£100,000 over two years, awarded in 2011/12



Young actors in 'The Only Way is Chelsea's' at York Theatre Royal in October 2013, produced as part of the theatre's TakeOver Festival.

York Theatre Royal received funding in 2011 for the TakeOver project, initiated in response to growing demand from young people to get involved and have an influence over the activity of the theatre. TakeOver allowed a group of young people to take over the programming and running of the theatre for a three-week festival period. The aim was to offer young people a genuine experience and real responsibility.

TakeOver engaged over 350 young people in the theatre over two years. They managed the festival and participated in creative workshops, performances and immersive theatre events. "There isn't any other opportunity where in your early 20s you're going to learn how to run a theatre," said one young participant. "You just don't get that experience anywhere else, you learn so much just by doing it."

Another added: "I never would have dreamt of setting up a theatre company when I was 23 before TakeOver, but after TakeOver I went out and did it ... and now I expect more of venues."

One of the most successful elements of TakeOver was the residency project. This offered an opportunity to reverse the usual theatre-making process and involve the designer, writer and producer from start to end.

Vicky Biles, the general manager, says that the PHF funding had a significant impact on the theatre as a whole, as well as the lives and creative development of the individuals that took part in the project. Young people involved in TakeOver were able to develop their confidence and a range of professional and personal skills. "Older participants learned practical and industry-related skills to help them on their arts career paths," she said. "Younger members reported a development of business, governance and communication skills that assisted them in current activities such as School Council, and that they felt would be of help for university and job applications in future years."

Vicky adds: "TakeOver has been a learning curve for all involved – the young people and theatre staff. The project is an experiment in democracy and we have learned that we must open the door fully to the experience. It is essential to offer a real-life experience as this is what makes a genuine difference in the relationship with young people.

"We have also learned just how mutually beneficial it is to work closely with our community in producing a programme of work, and how much we have changed as an organisation to make this happen."

The theatre now has a programming board that includes a number of young people. Plans for the future include creating a supportive network of alumni to share information about running festivals and to help them continue their professional development. The theatre also wants to share its learning with other arts organisations and develop a toolkit based on its experience.

Arts programme

Grants awarded in 2013/14

Special Initiatives

ArtWorks: Developing Practice in Participatory Settings

Anna Lopez	£3,500
Beavers Arts	£3,500
Heads Together Productions Limited	£3,500
Melaneia Warwick	£3,500
Royal Scottish National Orchestra	£3,500
Trinity Laban Conservatoire of Music and Dance	£3,500
University of Hull	£3,500
Support costs	£243,156
	£267,656

Awards for Artists

Eight awards to individual artists of £50,000 payable over three years.	
Composers: Emily Hall, Bryn Harrison and Chris Watson	£150,000
Visual arts: Margaret Harrison, Stewart Home, Torsten Lauschmann, Cally Spooner and Ian White. As Ian White sadly passed away before we could announce he was a recipient, we are following his wishes and will use part of his Award to support a group of seven artists who he designated in his lifetime and another part to contribute to an ongoing legacy of his work.	£250,000
Support costs	£52,858
	£452,858

Breakthrough Fund

Untitled Projects Additional core salary support for up to a year at the end of an earlier Breakthrough Fund grant.	£35,000
David Agnew/Bury Metropolitan Arts Association David is currently Director of the Bury Metropolitan Arts Association (The Met), on the outskirts of Manchester. Having revitalised the venue, making it financially viable and artistically sound, he wants funding to set up his own producing company – So It Is – to support and develop music and theatre provision in Lancashire and Southern Cumbria.	£180,000
Emma Jordan/Prime Cut Productions As Prime Cut's Executive Director, Emma has recently collaborated with Bosnian theatre-maker Haris Pašović, creating with him 'The Conquest of Happiness' for the Derry/Londonderry 2013 Capital of Culture programme that toured to Mostar, Sarajevo, Ljubljana and Belfast. Funding will enable her to develop a talent lab for emerging artists across Northern Ireland, as well as a series of creative encounters with artists from various art forms.	£295,000
Magdalena Schamberger/Hearts & Minds Ltd Magdalena is CEO and Artistic Director of Hearts & Minds, the organisation responsible for the Clown Doctors (working in hospitals) and the Elderflowers (for people with dementia). Funding will enable her to explore other art forms to re-invigorate her practice; develop a new performance style that will enable dementia sufferers and their families/carers to build common experiences; and pilot a training process to help artists and staff understand what it is to be old.	£250,000
John Rostron/Sŵn Festival John founded the Cardiff-based music festival Sŵn (pronounced 'soon') in 2007. It has grown into a successful four-day event, recently winning an NME award for best small festival. Initial funding of up to £95,000 over 18 months will allow John to develop his vision and a strategic business plan.	£300,000

Jimmy Akingbola and Fraser Ayres/TriForce Promotions Jimmy and Fraser founded their company ten years ago to create a network for actors and professionals in the performing arts. The company has successfully developed showcasing events and creative projects that are beginning to change how the casting process and industry work. Funding will enable the two founders and their colleague Minnie Crowe to be paid a salary for the first time and to extend the company's work.	£250,000
Zeon Richards/Renowned Group Zeon set up and runs his own artist management company, working in music, spoken word and film. The first phase of funding, of £40,000, will allow him to carry out a feasibility study for a new company, uConnect, to promote social mobility for young people aged 16–19 by providing mentors within the music industry.	£246,000
Lizzie O'Neill/Z-arts Lizzie is CEO of Z-arts, Manchester's venue for children and families. She successfully turned around the organisation, making it commercially and artistically stable, and connecting well with increasing audiences. Funding will allow her to explore ideas about what family theatre means today.	£255,000
Support costs	£49,397
	£1,860,397

Our Museum: Communities and Museums as Active Partners

Museum of East Anglian Life	£49,500
Support costs	£356,535
	£406,035
Special Initiatives total	£2,986,946

Open Grants

Arts Migrations CIC – Wales To develop the presentation of high-profile international contemporary dance performances, with and for communities and audiences in Wales.	£90,000
ATMA Dance – UK wide Support for organisational development to develop a robust business strategy to realise the artistic ambitions of the organisation.	£8,500
AV Festival – London The implementation of a new traineeship, volunteer and associates programme, supported by a new part-time post of Volunteer and Training Manager.	£75,000
Beating Wing Orchestra – North West For action research developing a coherent approach to work with refugees and asylum seekers through music in the North West.	£10,000
Belarus Free Theatre – Multi-regional Core support for the organisation to develop its research-based documentary theatre practice in the UK.	£50,000
Capsule Events Ltd – UK wide Funding to replace the short-term Festival Coordinator contract with a new year-round post and to review the Supersonic Festival, choosing a new venue and format.	£64,000
Cardboard Citizens – London Core support for three years towards the development of a Centre of Excellence for engaging excluded groups in transformative theatre.	£150,000
Carousel Project – UK wide Funding for Creative Minds, a conference about assessing quality in learning disability-led arts, performance and film.	£9,500
Chisenhale Gallery – UK wide To support a mapping exercise examining artists' professional development programmes and gallery member initiatives within UK and international arts and cultural organisations.	£10,000

<p>Clore Duffield Foundation – Multi-regional Additional funding to support a review process and strategy away-day for the Cultural Learning Alliance Review.</p>	£9,000	<p>Project Ability – Scotland To develop, structure and evaluate Collaborators, an arts programme bringing together artists with disabilities and contemporary visual artists to share and learn from each other.</p>	£61,000
<p>Clore Duffield Foundation – UK wide To underpin half of core costs of the Cultural Learning Alliance to ensure that children and young people are able to actively engage with the creation and enjoyment of arts and heritage across the country.</p>	£61,000	<p>Punchdrunk – London Core costs for Punchdrunk’s Enrichment programme, delivering participatory theatre projects in schools and communities.</p>	£150,000
<p>Community Foundation for Northern Ireland – Northern Ireland Funding for the Inspire Project, which provides bursaries and mentor support to at least 30 individuals with learning difficulties for development through the arts.</p>	£75,000	<p>Rugby League Cares – Multi-regional A programme of community and professional dance activity within the 2013 Rugby League World Cup and subsequent season.</p>	£82,000
<p>Contemporary Art Society – UK wide The National Programme of Artists’ Talks in regional museums.</p>	£10,000	<p>Siobhan Davies Dance – London Funding for Next Choreography, a project engaging young people in the arts through choreography.</p>	£150,000
<p>Counterpoints Arts – Multi-regional Core support for this hub of creative arts and cultural projects exploring refugee and migrant experiences through participatory arts and media projects.</p>	£80,000	<p>Site Gallery – Yorkshire and Humber Funding over 30 months to establish a participation programme for young people to take the lead in commissioning visual arts projects.</p>	£70,000
<p>Create Gloucestershire – South West An action research project, Making Culture Work, to design and pilot a collective ‘prove and improve’ framework for the arts and cultural sector in Gloucestershire.</p>	£50,000	<p>Sound and Music – Multi-regional Support to create Composer-Curator, a series of performances and festivals curated and produced by composers, offering new ways for audiences to experience new music.</p>	£60,000
<p>Derby Theatre – Multi-regional One year of core support for the Learning Theatre pilot, with the option of two further years, to underpin the development of a community and participation programme.</p>	£150,000	<p>Talawa Theatre Company – UK wide Funding for a Literary Associate post and creation of a Black Writers’ Development Network.</p>	£75,000
<p>FACT – North West Support to develop FACT’s programme for artists and veterans, and to create a model of good practice that can be rolled out across a range of arts sectors.</p>	£90,000	<p>The Bluecoat – North West Funding for five art clubs, with activities linked to gallery programming, for children aged 6–11, supported by learning-disabled artist volunteers.</p>	£90,000
<p>Fevered Sleep – UK wide Funding to support the evaluation of Future Play, a new touring model for performance for children under seven.</p>	£6,000	<p>The Hepworth Wakefield – Yorkshire and Humber To create long-term opportunities and progression routes for NEET young people, enabling them to access art-based activities to develop their employability, social and life skills.</p>	£95,000
<p>Glasgowbury Music Group – Northern Ireland To provide positive and creative opportunities to people of all ages while being an essential part of Northern Ireland’s musical future.</p>	£50,000	<p>The Poetry School – UK wide A poetry education programme, using collaborative learning and digital platforms, to increase participation for individuals from disadvantaged backgrounds.</p>	£60,000
<p>Grizedale Arts – UK wide To commission consultants to undertake an independent study to help shape a new future for Grizedale Arts.</p>	£10,000	<p>The Reading Agency – UK wide Core support for World Book Night over 12 months to underpin the Chief Executive’s salary and develop new evaluation and research.</p>	£50,000
<p>Hackney Music Development Trust – London The next stage of supporting a unique jazz programme headed by Julian Joseph, which develops opera, dance and instrumental projects for young people, inspired by the historical roots of jazz.</p>	£45,000	<p>Tinderbox Theatre Company – Northern Ireland Support for the CONNECT Programme to develop collaborative approaches to creating and delivering community-based theatre arts projects in Northern Ireland, involving participants at every stage and level of activity.</p>	£112,000
<p>Leisure in the Community – East Midlands An additional grant to enable consultancy support for evaluation and research of the LOV X Change Programme Evaluation Review.</p>	£7,000	<p>Tonic Theatre – Multi-regional To work with the Artistic Directors of ten theatres to identify institutional barriers affecting women, and devise imaginative and practical ways to overcome them.</p>	£10,000
<p>Multi-Story Music – London Funding for core staff costs for Multi-Story Music’s organisational development.</p>	£54,000	<p>Urban Development Music Foundation – London For an action research programme looking into business development options.</p>	£99,000
<p>National Theatre Wales – Wales Developing the TEAM model of local community leadership, deepening it within the organisation, expanding the network and sharing the model internationally.</p>	£260,000	<p>Vortex Jazz Foundation – London Core funding over two years to allow the Vortex Club to work more strategically and develop the club’s external programme in Gillett Square, Dalston.</p>	£40,000
<p>National Youth Theatre – UK wide Core funding support, over two years, to underpin the continuing strategic re-focus of NYT’s activities.</p>	£200,000	<p>Writing West Midlands Ltd – Multi-regional To fund a collaboration between writing agencies in the east and west Midlands to improve and offer greater coverage of youth literature activities.</p>	£86,000
		Open Grants total	£2,914,000
		Arts programme total	£5,900,946

Pupils at Gladesmore School in Tottenham, north London, take part in Language Futures. The language learning programme, developed by a group of schools supported with funding from PHF, enables students to take greater control of their own learning, studying languages of their choice and helping each other to learn. The scheme also uses learning mentors from the school staff and community.

Education and Learning





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Education and Learning programme

Report

The work of our Education and Learning programme over the last seven years has focused on supporting the development and diffusion of innovative ideas to improve education and increase people's learning. Our Open Grants scheme and Special Initiatives have sought to address specific challenges, to generate knowledge and to trial ways of working that can influence practice beyond the grantee organisations and school or university partners that we have directly supported.

Collaborative learning

The active facilitation of collaborative learning has always been a core element of our Special Initiatives. We have regularly brought teachers and others together to reflect on their practice, and seek a shared understanding of what works in improving outcomes for young people and sustaining change.

This approach, particularly in the context of working with schools, chimes with respected research that indicates teacher collaboration and the development of professional learning communities can be a highly effective route to change in the education system.

In 2013/14, we entered the fifth year of working closely with our Learning Away 'community of practice', made up of 60 schools working in 13 clusters across the country. Our provision of support grants alongside tapering implementation grants has given busy teachers the means to engage actively in learning, evaluation and knowledge management processes. This year many have been involved in drafting resources, guidance materials and case studies to share their experience with others.

Our Musical Futures initiative has grown from the ground up into a vibrant movement that now supports an active community of thousands of music educators, teachers, academics and young people in the UK and beyond. The team placed particular emphasis this year on encouraging teachers to 'take.use.innovate.share', a mantra that reflects our emphasis on Musical Futures as a movement for teachers, driven by teachers.

For our Open Grants recipients, we have held a number of well-received workshops, bringing grantees and other organisations together. Themes included the principles and implications of different economic evaluation approaches, how to build an online community to support practice-sharing beyond geographical boundaries, and innovative approaches to language learning for supplementary schools.

Sharing good practice

From the start of our initiatives we have been conscious of the need to focus on our longer-term goals of wider influence. This has meant fostering an outward-facing disposition amongst those we have worked with. Schools and universities have recognised that they are working on behalf of the wider system, and we have emphasised the importance of capturing impact data and knowledge that will help transfer approaches to other settings. We have openly shared our thinking and findings with wider audiences as our own initiatives have progressed, seeking to build wider communities of interest that can draw people in to apply our findings and practice development in their own contexts.

We have developed new websites this year for Learning Away, Musical Bridges and Language Futures, and produced a range of new resources. These included our first Learning Away publication, promoting high-quality residential education; a second edition of our *What Works? Compendium of Effective Practice* for developing student engagement in higher education; and updated audio and sheet music resources to support joint music-making between primary and secondary schools under our Musical Bridges programme. For Musical Futures, we launched our first app.¹

We were pleased to award IntoUniversity a major three-year grant this year, to build the knowledge and capacity of the supplementary school sector to increase students' access to higher education. The organisation also aims to influence the higher education sector by raising awareness and stimulating partnership working across the country between the HE and supplementary school sectors. Other grantees

¹ Details of all Special Initiatives are on pp.26–27

that have worked actively to share their practice include Shpresa, Chol Theatre, the Boys Development Project, Dandelion Time, The Mulberry Bush Organisation and Radio Regen.

Our two-year evaluation by the Office of Public Management (OPM) of the therapeutic approaches used by three of our grantees to tackle truancy and exclusion was concluded this year. OPM reported that all three – School and Family Works/SWIFT, Mounts Bay Academy and Teignmouth Community College – saw a positive impact on key measures of truancy and exclusion, and all highlighted real value in learning from each other’s practice. Two of them felt that they had made a step change in their capacity to evaluate their work effectively and to use this information in their decision-making. We were pleased to hear that School and Family Works went on to win Project Oracle’s 2013 Evidence competition. With OPM we will be publishing three leaflets in summer 2014 to share learning from the evaluation more widely.²

Language Futures

We have continued our support for Language Futures, a highly innovative, personalised approach to language learning, initially developed by Linton Village College in Cambridgeshire and since trialled in a number of schools. The approach typically engages students by enabling them to select a language to learn that is meaningful to them, equipping them with the skills and motivation to manage their own learning process. Students tap into online and in-school resources to support their language learning and are supported by their peers, and often by community mentors, under the guidance of their teachers. Project-based learning is a core element of the approach.

Over 100 people attended events this year to learn more about Language Futures. The initiative’s website³ provides guidance and resources for the growing number of schools interested in the approach. This year Byron Wood Primary School in Sheffield became the first primary school to introduce Language Futures for its pupils.

Music Education Review

We commissioned an independent review of the state of schools-based music education, led by Katherine Zeserson from Sage Gateshead. Her report *Inspiring Music for All – next steps in innovation, improvement and integration*, drew on in-depth interviews with leading figures in music education, a roundtable discussion with sector specialists, youth focus group sessions, an online survey of teachers and analysis of over 90 primary literature sources.

The review found that there is still too little music-making in many classroom music lessons and, as has been reported by Ofsted, the quality and reach of schools-based music education is still unacceptably inconsistent. However, we also found that the best music in schools is now significantly more inclusive, more musically diverse and of higher quality than it was a decade ago. Where music is good it is often very good, characterised by creativity, engagement and musicality.

The review highlights real concern that the gap between the best and the worst music in schools is getting wider rather than narrower. However, it also gives cause for optimism, identifying a high level of consensus across the music education sector around the root causes for this widening gap – which allows for it to be tackled collectively.

The review makes recommendations for all stakeholders in the music education sector, who need to work together to improve the quality of provision and to disseminate best practice. Our Musical Futures team will be playing an active part in addressing the issues raised, including sharing with others their strategies for engaging teachers in peer learning and professional networks.

Denise Barrows
Head of Education and Learning

² Case studies of each of the three grants evaluated by OPM will be published on our website

³ www.languagefutures.org.uk

Education and Learning programme

Special Initiatives

Musical Futures

A movement to reshape music education driven by teachers for teachers

£365,917 in 2013/14

Musical Futures aims to provide engaging, sustainable and relevant music-making activities for all young people, by promoting and developing innovative, high-quality music teaching and learning in schools across the UK. At its core is an approach that brings creative ways of thinking about music-making into schools, using a mix of aural learning, composition, improvisation and performance to engage and motivate young people, building from their own musical interests.

New surveys by the Institute of Education and York Consulting provide indications of the reach and impact of Musical Futures. Fifty three per cent of 253 secondary teachers replying to the Institute's survey reported that the music team in their school uses Musical Futures regularly, with 92 per cent of these agreeing that Musical Futures has made a significant and positive impact on the quality of music learning in their school. York Consulting found, between 2002 and 2013, a 70.2 per cent increase in pupil numbers studying music at Key Stage 4 in Musical Futures schools, compared with an 18.3 per cent increase in non-Musical Futures schools and 31.6 per cent for all schools overall.

Musical Futures is playing an increasingly important role in tackling the professional isolation of many music teachers and consistently enhances professional satisfaction and teaching confidence for its users. We held more than 60 professional development events during the 2013/14 academic year, attended by 650 teachers, and maintain active partnerships with 22 out of the 25 initial teacher education providers that offer a music specialism.

Our online community has continued to grow, with teachers regularly discussing problems and best practice online, including through a weekly live chat on Twitter. Our new app launched this year and was downloaded by more than 1,000 people in its first three months. The app provides a rich, interactive resource that offers a new perspective on using Musical Futures effectively in the classroom.

This year marked the tenth anniversary of Musical Futures. We estimate that at least 210,000 young people benefit from Musical Futures each year and that well over a million young people have participated over the last decade.

Learning Away

Initiative promoting residential learning in schools
£210,579 in 2013/14

This year we entered the final academic year of the action research phase of Learning Away. Sixty schools, including primary, secondary and special schools, have been working with us over five years to develop, test and evidence exemplary practice in residential learning. Thousands of pupils have benefited from a wide range of enriching experiences, all incorporating overnight stays. The schools have participated in a collaborative and ongoing learning process that has resulted in a depth of understanding about effective practice that we hope will now prove influential for schools more widely.

With our first pamphlet published, and growing evidence of impact, a priority this year has been to embark on a purposeful dissemination and influencing strategy. Our Project Leader, Peter Carne, and Programme Advisor, Sir Tim Brighouse, have spoken at key events for school leaders, teachers and residential centre providers to raise awareness of our findings and recommendations

In launching a website this year, which we hope will become the 'go-to' resource for schools keen to increase the impact of residential learning, we are promoting the concept of 'Brilliant Residentials'. These residentials are led by teachers, co-designed with pupils and fully integrated into the curriculum. The website is already populated with a wide range of case studies and information, which will be complemented in autumn 2014 by a comprehensive set of guidance materials on a range of relevant themes.

Our Learning Away strategy includes an emphasis on building key partnerships with organisations that can help to further our goals. A new link with Historic Royal Palaces came to fruition this year and resulted in 80 Year 10 students from the Canterbury Academy in Kent attending the very first residential visit at Hampton Court Palace.

With the Group for Education in Museums, we are working now to encourage other heritage venues to host overnight visits from school groups. Key networks of residential centres are also taking our recommendations on board and seeking to work more collaboratively with schools to design their programmes and activities.

What Works? Student Retention and Success

Developing student engagement in higher education
£14,062 in 2013/14

Since 2008 we have worked to build understanding within the higher education sector of how best to nurture student engagement and belonging as a key strategy for boosting student retention and success.

Our initial research, drawing on the experiences of 22 universities, demonstrated that students are most likely to feel like they belong to their particular discipline group, with a sense of belonging generally decreasing at departmental, school and institutional levels. In addition, many students do not utilise central academic development and pastoral support services. As a result, engagement and belonging must be nurtured through universal activities in the academic domain and, in particular, through high-quality, student-centred learning and teaching.

The findings and recommendations of this first phase of What Works (2008–11) have continued to influence policy and practice across the higher education sector this year, with the Office for Fair Access advising institutions to take our work into account in planning their Access Agreements, and extensive citations in the *National Strategy for Access and Student Success Interim Report* and subsequent reference in the new National Strategy published in April 2014.

Thirteen institutions are participating in the second phase of the initiative, a three-year institutional change programme with a retention and success focus, being delivered by the Higher Education Academy. Through this, we aim to build strong evidence of impact and demonstrate how our recommendations can be implemented successfully at departmental and institutional levels, across a range of universities, to significantly improve student retention and success.

What Works has benefited greatly from the expertise and networks that our key partners – the Higher Education Funding Council for England (in phase one) and the Higher Education Academy and Action on Access (throughout) – have brought to the work. This has enabled extensive dissemination activities through regular conference presentations and briefings distributed across the sector. The work undertaken through the initiative has also informed a special issue this year of the *Journal of Widening Participation and Lifelong Learning*.

Musical Bridges: Transforming Transition

Supporting music learning during the transition from primary to secondary education

£141,924 in 2013/14

Since this initiative was launched in 2010, its aim has been to help primary and secondary schools work together to improve their pupils' experiences of school transfer, with a particular focus on music. Over this time, the Musical Bridges team has designed and field-tested teaching resources that have helped over 100 cross-phase partnerships to support their pupils better.

Musical Bridges stresses the importance of joining up administrative transfer arrangements, along with a need for high-quality pastoral support for pupils. It also highlights the importance of curriculum continuity between primary and secondary phases, and how best practice is enhanced when teachers share their approaches to teaching and learning. Our 'Five Bridges' framework (after Galton, Gray and Ruddock, 1999) also emphasises the value pupils attach to their own musical experiences, in particular demonstrating their skills as young leaders. These experiences can provide significant practical, social and emotional 'bridges' to support their integration into their new secondary school.

During 2013/14 we ran a national awards scheme to find the most inspiring music collaborations that are effectively supporting pupils' transition from primary to secondary school. Our prize winners, the East Riding Schools' Music Service, Bishop Justus Church of England School in Kent, Dawling Learning Partnership in Telford and the North Downs Schools' Partnership in Surrey, provided fantastic examples of the Five Bridges in action.

As our programme of work for Musical Bridges draws to a close, we have been developing a new website to ensure that our learning remains accessible, and hopefully influential, contributing to an ongoing legacy from the initiative. The network of 122 music education hubs, charged with supporting schools-based music, represents a significant route through which we hope that Musical Bridges will continue to stimulate improved transition practice. A national survey of hubs undertaken on our behalf by York Consulting showed high levels of awareness of Musical Bridges, with 96 per cent of respondents stating that transition is either a priority or an emerging priority.

Education and Learning programme

Open Grants scheme

Space Unlimited

£222,912 over 30 months, awarded in 2011/12



A learning event for teachers and young people from schools across South Lanarkshire, who worked together to consider the sustainability of the programme across the Local Authority.

Based in Glasgow, Space Unlimited is a social enterprise that uses youth-led enquiry to improve services across a range of sectors. In education its work focuses on student-led enquiries into learning and teaching. The enquiries address issues such as ‘What kind of learning experience do you need to prepare you for your future?’. This is followed up with support for young people and educators to help them work together to implement change in their school.

A PHF grant supported the Changing Together project, in which Space Unlimited worked with 14 schools across three local authorities in Scotland and four additional schools in England.

Space Unlimited works hard at creating a level playing field so young people feel listened to and heard. The first enquiry day involves developing an understanding of roles and how these will be different to those usually experienced in school.

Project Facilitator Gill Gracie says: “The enquiry process allows young people to talk honestly with teachers about what’s working and what they want to change. The enquiry is very much led by young people, with teachers taking more of a listening role in the conversation. This helps young people develop their confidence, articulate their perspective with their peers and with adults, speak in public and build self-awareness.”

Feedback on the process from students has been positive. “We became confident and comfortable to speak and take part and that’s what we needed to take our ideas further and to try and make a change,” said a pupil at Trinity High School. Another, from Whitehill Secondary School, said: “I learned that I can be overpowering. It’s okay to lead, but not if you shut others out. I realised that when you contribute and help others to share, you get more.”

Gill says the process helps to improve relationships between teachers and young people. “We are seeing a commitment to change,” she says. “Nearly 80 per cent of students and 90 per cent of teachers say they want to bring the ideas to life in their schools.”

A pupil at Castle School said: “Before this I didn’t realise that pupils can change their school and I didn’t think we’d be able to have that much impact, but we can.”

Space Unlimited says that reporting back to PHF has been helpful as a discipline, reflecting on change and helping the organisation to refocus. “The questions encourage us to reflect in an un-prescriptive way,” says Gill.

This has helped Space Unlimited reflect on its other work.

“We are also thinking about applying this model between schools and the community and, in Glasgow, we have been working with a group of looked after young people in residential units,” says Gill. “We’re interested in how best to adapt our enquiry process to so that more young people have a voice and feel confident to influence change.”

DigiSmart (LIFT for Learning)

£237,465 over three years, awarded in 2011/12



Children using the DigiSmart system on tablet computers in the classroom.

Katie, 10, felt physically sick ahead of giving a talk on dolphins to 11 of her classmates. Like many children with low reading ability, she found tasks like this hugely daunting. But, when she finished her presentation, the group cheered, and the confidence she gained made her want to give the talk in front of her whole class, and then in assembly.

Katie's presentation was part of a session with DigiSmart, an IT-based education programme for primary school children with poor reading skills from low-income backgrounds. It was launched in 2002 as a pilot and now partners with 500 primary schools. Research from the University of Roehampton has found that it significantly improves literacy and reading confidence.

"The PHF grant has been very strategically focused on training and scalability," says Strategic Director Dr Maggie Holgate. "It has enabled us to put in place a richer training programme with online videos, increasing access across the UK. It has been an incredible investment."

The grant is also enabling DigiSmart to see if teachers translate principles into everyday teaching to increase general levels of attainment. Maggie adds: "PHF is the first funder to see researching and evaluating this wider outcome as a priority, supporting a dedicated research study."

"It has been fantastic for the children from vulnerable groups," says Kim Farrall, a teacher from St. Edward's CE Primary School in Rochdale. "DigiSmart provides a very nurturing environment which has had a really good impact on attendance, behaviour and literacy."

One child, Karl, who had been moved from another school, was very aggressive. Kim explains: "In DigiSmart, we were able to give him more attention. He then took the skills he learned back into the classroom. Teachers noticed the change in his behaviour and his reading improved."

Kim adds that DigiSmart has helped her teaching. "I use the skills in different contexts," she says. "For example, when the children are giving presentations I teach them to find key words and make sure that they focus more on relevant facts rather than just copying and pasting."

Sue Flannery, a teacher at Banks Road Primary School in Liverpool, echoes Kim's experience. She describes one girl at her school, Jolie, as "Probably one of the most problematic children ever. She was angry most of the time, didn't engage with learning and couldn't make friends. It was a miracle if she stayed in a class. It was a really big moment when she did her presentation. It had a massively positive impact on her self-esteem and she saw herself as someone who could participate."

DigiSmart's plans for the future are to make the model more flexible, for example by opening it up to children in Year 6 and making it available to pupil referral units. The organisation also wants to take advantage of the fact that tablets are increasingly being used in classrooms. Maggie says: "A very big revolution is happening in education, which means that technology is no longer restricted to a 'computer room' – it can be delivered in any classroom or learning setting, at any time."

(Children's names have been changed.)

Education and Learning programme

Grants awarded in 2013/14

Special Initiatives

Learning Away

Support costs: development and evaluation, events and school support £210,579

Musical Bridges: Transforming Transition

Support costs: research and evaluation, advocacy and dissemination, events and consultancy £141,924

Musical Futures

Support costs: development, advocacy, dissemination, teacher CPD and school support £261,964

Musical Futures UK

Support costs for countrywide expansion into Scotland, Wales and Northern Ireland £103,953

What Works? Student Retention and Success

Support costs: coordination, dissemination and evaluation £14,062

Special Initiatives total **£732,482**

Open Grants

Aqoon School-Home Support Services – East Midlands
Support for Complements to 4, a pilot supplementary education programme to develop confidence and study skills of ten year olds who are not working at the expected level in English and maths. £51,860

ARC Theatre – London
Raised Voices will develop young women as leaders through film and public speaking, to give them a platform and voice in issues such as youth violence and gangs. £165,000

Archaeology Scotland – Scotland
The Heritage Heroes Intergenerational Project will work with a local heritage group and community to deliver a collaborative archaeology learning project. £24,604

Association of Northamptonshire Supplementary Schools – East Midlands
To establish and support the development of three supplementary/ mainstream school clusters working across Northamptonshire. £158,064

Big Community – West Midlands
To develop Learning to Live, a project providing therapeutic support for children and young people with emotional and behavioural difficulties in Birmingham. £150,000

Black Families Education Support Group – South West
Funding for the Supplementary Education Hub, a partnership of supplementary and mainstream schools, colleges and universities to improve educational provision and outcomes for minority ethnic pupils. £127,120

Byron Wood Primary School – Yorkshire and Humber
To pilot the Language Futures Primary School programme of innovative language learning activities. A Saturday Club will be established and language learning embedded in a range of other clubs. £10,000

Canterbury Academy – South East
Support for the Riverside Youth Centre Engagement Programme, supporting young people at risk of permanent exclusion to make successful transitions into post-16 education and training. £57,246

Child-to-Child Trust – London
Funding for Hearing All Voices, a project to develop the speaking and listening skills of refugee and asylum seeker students, to empower them and promote their inclusion in schools and FE colleges across London. £149,955

Conflict Resolution Education – Yorkshire and Humber
An action research project exploring effective peer mediation in conflict resolution for 11–18 year olds in secondary schools. £87,086

Co-Operation Ireland – Northern Ireland
To develop young people's speaking and listening skills to improve communication across communities and reduce segregation. £68,292

Demos – Multi-regional
A pilot to measure the impact on exclusion, truancy and educational performance of disadvantaged young people involved in pupil-led educational outcome setting and co-production. £119,250

Education for Employability – Multi-regional
Funding to work with teachers, employers and students to develop, trial and modify materials to improve students' speaking and listening skills in work experience programmes. £49,780

<p>Eighteen And Under – Scotland For Youth Listening to Youth, a project to train and support NEET young people to develop their communication and conflict resolution skills and provide peer support to other young people at risk of exclusion.</p>	£152,068	<p>The BeatBullying Group – UK wide For a project supporting children through the transition between primary and secondary schools with online and offline mentoring, advice and counselling.</p>	£140,596
<p>Enabling Enterprise – Multi-regional Support for Active English, a two-year pilot developing pupils' speaking and listening skills by linking the classroom with the world of work.</p>	£44,000	<p>The School and Family Works – London A three-year project, Changing Perceptions, to change the way schools and services interact with families facing multiple disadvantage in Hounslow.</p>	£227,499
<p>FOCUS Charity Limited – London Contribution to core salaries and capacity building support to develop a new business model.</p>	£60,000	<p>TLG The Education Charity – UK wide Scaling up an early intervention programme to provide behaviour coaching for children at risk of truancy and exclusion.</p>	£81,280
<p>Global Education Derby – Multi-regional Funding to work with seven schools over three years on Other Voices, a peer education project. It brings together communities divided by difference to develop speaking and listening skills.</p>	£103,950	<p>Youth at Risk Ltd – London Two-year development and wider piloting of Aspire, a programme of school-based personal development and coaching for students at high risk of exclusion.</p>	£77,132
<p>IntoUniversity – Multi-regional To provide direct support to supplementary schools in three cities, and wider training and guidance on enabling young people from disadvantaged backgrounds to gain entry into HE.</p>	£297,866	<p>Open Grants total</p>	£3,463,671
<p>Leap Confronting Conflict – London To help young people develop communications skills to manage conflict effectively and mediate between peers, improving the school learning environment and modelling leadership.</p>	£136,598	<p>Education and Learning programme total</p>	£4,196,153
<p>London Borough of Hammersmith and Fulham – Multi-regional To develop Time for Change, a project that provides transition support to 200 young people in Year 11 who are most likely to become NEET, helping them to become more engaged and move forward.</p>	£143,480		
<p>Louise Da-Cocodia Education Trust – North West For the Getting A-Head supplementary education programme, which motivates and empowers young people to make positive decisions about their future education, training and employment options.</p>	£117,913		
<p>My Voice London – London Provision of core support to sustain the organisation during a strategic review.</p>	£20,000		
<p>National Institute for Adult Continuing Education – Multi-regional To develop and pilot new ways of delivering family numeracy programmes, underpinned by digital learning.</p>	£149,950		
<p>National Numeracy – Multi-regional Funding for scoping and developing the Firm Foundations and Parental Engagement Project.</p>	£149,431		
<p>NEAD – East of England Funding for the development of Eco Team Challenge, a network of trained youth workers supporting 480 disadvantaged young people in Norfolk and north Suffolk to improve their employment prospects.</p>	£149,802		
<p>Peace Child International – Multi-regional Support for Work the Change, which trains young people (aged 16-19) and school staff to work with pupils who are at risk of becoming NEET.</p>	£115,869		
<p>South London Refugee Association – London To fund Getting the Grades, a project to deliver supplementary education classes in maths and English for young refugees to improve their levels of attainment.</p>	£77,980		

A prisoner at HMP Pentonville reads in his cell. Prisoners' Education Trust works with around 2,000 men and women in prison every year, giving access to distance learning courses to expand education provision into subject areas and qualification levels not available within prison. This work, along with advice and support, increases inmates' chances of employment and avoiding reoffending after release.

Social Justice





Social Justice programme

Report

The Social Justice programme was established in 2006 to provide opportunities for marginalised young people to reach their potential. The programme has funded organisations that support young people facing challenges at key transition points in their lives, such as leaving care or prison, becoming homeless, seeking employment or asylum.

Over the last seven years more than 200 awards worth over £20m have been made through Open Grants to organisations engaged in sectors as diverse as housing, health, refugees, migration, arts, education, youth work, disability, domestic violence and criminal justice. This breadth was a deliberate strategy, recognising that the challenges young people face rarely fit neatly into one policy frame or administrative structure.

Our grants have allowed organisations to test new approaches and garner evidence of effectiveness as the basis for improvement. They have supported bold leadership, creativity in services, and work on unpopular and contentious issues. Enabling young people's voices to be heard and improving understanding between communities have been underlying principles across our grant funding.

Independence

There has rarely been a more critical time for a funder committed to social justice to maintain its independence of thought and action.

Austerity and the withdrawal of state support for many of society's most vulnerable people, mean that trusts and foundations need to be clear about how they prioritise and target their resources, which, although considerable, are limited. This programme has sought to maintain a focus on those who are most disadvantaged and least able to access support.

At times, the true picture of emerging social issues is obscured by political controversy and inaccurate media depictions. In this climate we have sought ways to ensure that debates are balanced and based on accurate information. This year we made a grant to the Migration Observatory at the University of Oxford to enable it to continue to undertake impartial, independent, authoritative

and evidence-based analysis of data on migration and migrants in the UK. The Observatory will inform media, public and policy debates, and generate high-quality research on international migration and public policy issues.

Immigration is the obvious example, though there are others, of where controversy risks clouding an issue. Foundations have a critical task in working out how best they can respond to it. Through our Supported Options Initiative, we have maintained a focus on supporting work that empowers young people who migrate and who are vulnerable – whether to help them avoid destitution, or to enable them to have a better understanding of their status and the options available to them.

Encouraging practical new approaches, grants were also made to Detention Action to test community-based alternatives to immigration detention, and to Music in Detention, a long-standing PHF grantee that brings professional musicians and local communities together with immigration detainees, to make music and enable often-ignored voices to be heard in new ways.

Convening and commissioning

Alongside grant funding – through Open Grants and Special Initiatives alike – we have also sought to share knowledge in the areas in which we fund. This year, we brought together groups of grantees in two sessions.

The first centred on youth leadership, an emerging interest of the programme. We brought together youth organisations and their young leaders at our offices. With young people driving discussion, PHF staff and trustees improved their understanding of the support young people identified that they needed to progress to leadership positions in civil society. This discussion, and the film generated as a result, was considered by trustees as part of the Foundation's strategy review.¹

The second event brought together grantees with an interest in increasing their impact through spreading the new, proven services they have developed. External experts led an interactive session, which aimed to promote sharing and mutual support amongst leaders seeking to achieve this type of growth. The need for funders

¹ See pp.6–9 for more on the Young Leaders' Day and the strategy review

to provide more effective support for organisations at such transition points has become increasingly apparent to us and is something we hope to address more fully in future.

This year we also commissioned scoping research on youth transitions – specifically, to assess the extent to which young people’s lives had been affected by the economic crisis and subsequent austerity. Led by the Royal Society for the Encouragement of Arts, Manufactures and Commerce (RSA), the research is also considering whether and to what extent recent research on neuroscience offered new possibilities in re-thinking and re-designing the way we support young people to reach adult independence.

Relationship funding

Funders often work closely with grantees, but over the course of the last seven years, staff in the Social Justice programme have developed particularly strong relationships with many organisations – in particular those in the early phase of development, and those making the transition to sustainability and growth. This has been rewarding, though demanding. We have had to understand in depth a wide range of fields in which youth support is offered, and improve our knowledge of organisational development. The provision of support from the National Council for Voluntary Organisations, via the Foundation’s Fitter for Purpose pilot, which ended in 2013, built on strong relationships with grantees by bringing in independent experts to offer bespoke help – around growth, fundraising, governance and other strategic issues. In future, we may look to take forward aspects of this approach.

Over the last few years we have funded a number of young entrepreneurial activists, often involved in starting up new bodies. This experience led us to commission – with Barrow Cadbury Trust and Calouste Gulbenkian Foundation – a series of European case studies of where foundations have helped to initiate new organisations. *The Inventive Foundation*, written by Diana Leat, explores how an entrepreneurial or inventive foundation can be involved in the conception and development of something new which the foundation also backs financially and supports in other ways.

This year again we supported social purpose start ups – both conventional charities and social businesses. Trustees agreed core support for Kinship Care Northern Ireland, which supports family carers, and CanDo Coffee, a social enterprise designed to enable disadvantaged and socially excluded young people to become self-employed, independent street traders.

Breaking down silos

Organisations working with young people increasingly have to do so in a way that involves risk-taking and work across the silos created by policy and by prescriptive funding sources. We have sought to help with these tasks.

Almost all social purpose organisations that work with young people recognise that the most marginalised and vulnerable, if they are to reach their potential, need help to address multiple and linked challenges – such as homelessness, drug use, mental health concerns, unemployment, lack of access to advice and support. However, it is very rare that funding allows the necessary ‘holistic’ work, as formal funding streams tend to be based on discrete issues.

Funding under PHF’s Social Justice programme has enabled innovative and unconventional approaches that cut across traditional ways of operating. This was a bold choice by trustees and has been challenging to deliver, since it inevitably means we receive applications from all sorts of sectors to carry out youth work on a range of themes, but it has uncovered some extraordinary new approaches and leaders.

Rob Bell
Head of Social Justice

Social Justice programme

Special Initiatives

Right Here

Youth Mental Health Special Initiative in partnership with the Mental Health Foundation

£248,834 in 2013/14

The five-year Right Here initiative aims to support youth and health sector organisations to work together in support of young people's mental health. It has worked with young people, youth charities and mental health agencies in Brighton and Hove, Fermanagh, Newham and Sheffield in a unique combination of youth participation and co-design, prevention, early intervention, resilience-building and anti-stigma activity, and local influencing.

Highlights

Highlights of the year included the publication of a young person's guide to self-harm and a guide for parents and carers by Right Here Brighton and Hove, building on the success of its good practice guide for GPs, published last year.

In Fermanagh and Sheffield, the projects continued to advocate for the role of youth work in early intervention, drawing on the views of young people and research evidence, including from the evaluation of their Right Here work by the Institute of Voluntary Action Research (IVAR). YouthAction Northern Ireland, for Right Here Fermanagh, produced a substantial policy briefing, *Young People and Mental Health, Policy and Research Review*, arguing for a radical shift from crisis interventions towards earlier approaches to build better mental health and wellbeing among young people. Right Here Sheffield's *'On the Edge', Right Here Sheffield 2010–2013*, recommends a new approach to mental health service design and delivery for Sheffield's young people, emphasising emotional wellbeing, mental health prevention and early intervention, and young people's participation.

Right Here Newham secured funds to participate in a number of new initiatives in the London Borough of Haringey, including Wellbeing Champions Programmes with Tottenham Hotspur Football Club and in schools.

Interim results from IVAR's evaluation of the projects demonstrated that they had benefited local policy and practice, the organisations leading the work, and the young people participating. For instance, the organisations were better equipped to engage with public health, adult and social care commissioning, and to extend the reach of their work to more and different groups of young people. Young people developed confidence, acquired skills for handling changes in their emotions, improved relationships with family members and peers, and felt able to forge relationships with

others. Many also came to realise that 'everyone has mental health', and that there is less difference between those who are 'well' and 'unwell' than they first thought.

National impact

At a national level, we focused on distilling the learning from the projects and sharing their most successful approaches. We produced case studies to demonstrate the range of approaches developed and the evidence that underpins them. We participated in a number of high-level conferences and commissions, including the annual International Youth Mental Health Conference and the National Youth Agency Commission on youth work in formal education. A new partnership with the Foyer Federation also enabled us to take the Right Here learning to a wider audience, with young volunteers from Right Here helping other young people to develop health-promoting activities and to influence health services for the young homeless.

In September, docready.org, the first of seven digital products from the Innovation Labs process (jointly managed with Comic Relief and Nominet Trust), was launched. Doc Ready is a website and app that aims to help young people get the most out of their mental health-related GP visits.

As the initiative draws to a close, we will be publishing a series of 'How to...' guides, to bring together learning from our work. Each guide will focus on a particular theme arising from the work and will provide practical pointers and suggestions to support the development of innovative and effective responses to the mental wellbeing of young people. The final evaluation of Right Here will be published at the end of 2014.

“The difference between how I was when I started and now – it's black and white. Before that I never would have thought about doing education again – now I'm doing my A Levels. Before it I wouldn't have talked to anybody – now I just talk to people when I want. It's been transformational.”

Young service user, Right Here Sheffield

Supported Options Initiative

Support for undocumented children and young people, in partnership with Unbound Philanthropy

£98,251 in 2013/14

Supported Options encourages and supports innovation in helping children and young people with irregular immigration status to live full lives. Children and young people in this situation are estimated to number about 120,000 in the UK, including many who were born here. They can be extremely vulnerable and in need of assistance to address their legal status. The initiative also seeks to better understand the experiences of these young people, and share this and practical responses with wider audiences, including those who influence and shape policy.

Through Supported Options, we fund charities and law centres to collaborate with others in designing and operating new approaches. We also seed-fund new ideas and commission research on knowledge gaps. Learning is shared through reports, blogs and web resources, and through a practitioner network.

This year, our seven funded projects, operating in children's charities, migrant community organisations and law centres, delivered direct support to over 400 young people. Young people were able to secure legal status in the UK, access housing, education and peer support, and get advice on leaving the UK. Grantees increased their reach through training a wide variety of faith, health, welfare and advice organisations.

Projects met regularly to develop ideas and skills, including undergoing training on using the law to defend family rights. In September, we hosted training on registering children as British citizens, attended by charities, housing associations, lawyers and social workers.

In October 2013, grantees, funders, evaluators and commissioned projects joined in a 'review cafe' to reflect on the most effective approaches to supporting young people and share ideas for future development. The interim evaluation, by the Institute for Voluntary Action Research, helped to inform these discussions.

Legal aid cuts

April 2013 saw severe cuts to legal aid funding, leaving many young people without access to lawyers to resolve their immigration problems. We supported grantees as they began to adapt their approaches, responding to this difficult environment. Strategies have included improving legal skills among youth workers, using peer-support groups, providing pro bono sessions and mounting a legal challenge to the withdrawal of legal aid.

During the year we commissioned a report that considered whether and how low-cost loans could help young people to safely finance their legal representation. The findings have led to further work to identify how support can be streamlined, working alongside schools. This work will continue next year.

Undocumented people's voices

As new immigration legislation was considered in 2013, there was public debate about the situation of those without legal status in the UK. Against this backdrop, the initiative has helped bring to life the experiences of young people in a number of ways.

Life without papers, a blog capturing the experiences of young people commissioned by Supported Options, won 'Best Writing' in the Blog North Awards and was shortlisted in the prestigious Amnesty International media awards in June. The story of 'Ruth', one of the young women in the blog, was featured in the *Daily Mirror* in January, and images were displayed in a pop-up exhibition outside Manchester Museum in November.

Young people supported by the Right to Dream project at Praxis Community Projects developed their 'Cost of Waiting' campaign this year. Highlighting the negative impact on young people of waiting for months or years for government decisions about their cases, they launched a report and two short films in July 2013. Both can be viewed on our website.

Growing up in a hostile environment was published in November 2013 by grantee Coram Children's Legal Centre. Using evidence from the casework and legal analysis funded by the initiative, the report describes young people's experiences and sets out how policy could better meet their needs.

Social Justice programme

Open Grants scheme

Prisoners' Education Trust

£105,000 over three years,
awarded in 2011/12



An inmate studies in his cell at HMP Pentonville.

Having been an offender for most of his life, Frank Harris is now a criminology undergraduate. As a member of Prisoners' Education Trust's alumni steering group he spoke at PET's 'Smart Rehabilitation' conference in April 2014. "After 30 years in and out of prison, I chose education as my route out," he said. "I am grateful to PET for funding my distance learning courses and for giving me a reason to feel worthwhile."

Stories like Frank's have become increasingly common. A recent report by the Ministry of Justice (MoJ) shows that people supported by PET to study distance learning courses in prison are a quarter less likely to reoffend than a matched sample of ex-prisoners.

Our grant to PET has been used to develop policy and research work. This has included developing alliances with other stakeholders, influencing policy makers and liaising with academics.

One of PET's main activities with its PHF grant has been to set up the Prisoner Learning Alliance. Its 18 members include the Open University, the Institute of Learning, which includes 1,500 prison teachers, and User Voice, an organisation led by ex-offenders. Head of Policy, Nina Champion, says: "We have quarterly meetings with cross-departmental senior officials. We share best practice, spread our influence and think about strategy." This work led to the 'Smart Rehabilitation' conference cited above, which brought together 200 stakeholders, and the publication of a report that sets out a blueprint for learning in prison.

"We have also used the funding to make sure prisoners have a say in improving education, and developed a toolkit and films to involve and inspire prisoners," adds Nina. PET was recently selected by the MoJ to work with eight prisons intensively to develop learner voice and a learning culture.

The charity is now working with Pro Bono Economics to assess the economic impact of its work. PET Chief Executive Rod Clark points out: "Courses we fund cost approximately £250, compared with £37,648, the annual cost of a prison place. Giving prisoners opportunities to use their time constructively to develop their thinking and employment skills is vital if we want to stop people falling back into a life of crime."

PET is also using the PHF grant to focus on learning from ex-prisoners who have been funded by the charity. It has set up a steering group of alumni to help it influence policy and practice. "We learn from them and encourage them to speak at events, to the media and policymakers," says Nina. The organisation also conducts a biannual survey of prisoners about education in prisons through the newspaper, *Inside Time*.

Nina says the charity is shaping the policy agenda. "We have been working with the Prison Reform Trust to look at the potential of ICT with regards to education and learning, family ties and resettlement. The Chief Inspector of Prisons, Nick Hardwick, has been very supportive and has since spoken about this at high-level conferences. For the launch of the report PET brought together two All Party Parliamentary Groups for Penal Affairs and for ICT, to discuss the use of ICT in rehabilitation."

Canopy Housing

£100,000 over three years,
awarded in 2012/13



House renovations in Leeds.

Nasra was living in a crowded hostel with no privacy. She registered with Canopy Housing Project and soon started helping to renovate a one-bedroom house. She says: “I learned DIY skills, such as decorating, putting together furniture, using a drill and saw – things I had never done before.” Within a month, the house was ready and she was able to move in and call it her home. “It has made a big difference to my life, I’ve learned how to be independent and do things for myself.”

Canopy renovates derelict houses that have been standing empty for years. It transforms them into homes through the hard work and commitment of volunteers and potential tenants.

Our grant has enabled Canopy to develop the volunteering aspect of its work, to spread good practice, to grow as an organisation and to develop partnerships. Its income has doubled in a year. It has housed 100 people and created six new jobs within the organisation.

Sarah was unemployed but wanted to make a difference and do something practical. She volunteered for Canopy for a few months. “This was a real eye-opener and gave me a sense of direction, I thoroughly enjoyed it,” she says. Using the skills she had learned, Sarah secured a job with the DIY company, B&Q, but kept in touch with Canopy and heard about the new role of site worker, created as part of Canopy’s volunteer development plan. Sarah applied and was appointed. “I was absolutely thrilled to get the job,” she says. “Life is good now, I’m a lot happier.”

Apart from her own experience, Sarah can see the benefits for volunteers with Canopy. “It provides a welcoming, community-based environment, where people can make new friends, learn new skills and if they are potential tenants, help to renovate their future homes.” She gives the example of an Eritrean man, who started working for Canopy a year ago. “His English has improved immensely and he has managed to secure a job, working in a bakery. He used to sleep on sofas but now has a place to live.” He still volunteers in the mornings before going to work.

Sarah says the organisation has been able to develop thanks to the funding. The PHF grant has given Canopy the capacity to develop partnerships with local housing providers and the local authority, negotiating lease arrangements, buying ten houses, and working together to overcome the problems caused by empty and derelict housing.

Canopy also shares its experience, successes and failures, with relevant organisations and groups to spread learning. In addition, it has developed its trustee board to ensure a robust organisation with a secure future.

Social Justice programme

Grants awarded in 2013/14

Special Initiatives

Girls in the Criminal Justice System

Support costs	£18,294
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Right Here

New Choices for Youth Trust Extra support for the period January-April 2014	£4,500
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Sussex Central YMCA Extra support for the period January-April 2014	£4,500
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YMCA White Rose Extra support for the period January-April 2014	£4,500
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YouthAction Northern Ireland Extra support for the period January-April 2014	£4,500
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Support costs Salaries for programme leadership; research and evaluation; capacity-building through consultancy and mentoring of young people.	£230,834
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Total	£248,834
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Supported Options Fund

The Children's Society Funding to document the need for vulnerable children to have access to free legal representation on immigration matters. Research to be used as a 'witness statement' in a legal challenge to restore immigration legal aid to children.	£9,947
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Support costs	£88,304
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Total	£98,251
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Special Initiatives total	£365,379
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Open Grants

Barrow Cadbury Trust – UK wide Contribution to a study exploring experiences and learning of foundations involved in initiating and supporting new, sustainable organisations.	£15,000
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Birmingham Leadership Foundation – West Midlands To research the wide-ranging leadership provision in Birmingham, to identify gaps, reduce duplication and increase access and progression for young leaders.	£9,000
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CanDo Coffee – UK wide Funding core costs to lead this expanding coffee-selling social enterprise into a growth phase.	£150,000
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Chance UK Limited – UK wide Funding the post of Quality and Evaluation Manager and to strengthen the evidence base for Chance UK's early intervention mentoring model.	£75,000
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Coram Voice – UK wide Supporting Coram Voice with core costs for three years to strengthen the organisation through a period of organisational change.	£120,000
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Council for Wales of Voluntary Youth Services – Wales To fund joint social action projects to promote collaboration in the Welsh voluntary youth sector.	£63,780
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Dance United – UK wide Core funding to support a transition to new leadership and developing a secure funding base.	£45,000
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Detention Action – UK wide To fund a pilot study, testing a community-based alternative to long-term immigration detention for young ex-offenders.	£90,000
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Fight for Peace UK – London A programme to spread Fight for Peace's diversionary youth sports programme across the UK.	£240,000
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Forum for Discussion of Israel and Palestine – North West To develop Women's Voices, a cross-communal project in Manchester, run by young women, using examples of cooperative initiatives involving Jewish, Christian and Muslim women in Israel.	£48,850
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Grandparents Plus – Multi-regional Funding for research into the outcomes of young people growing up in kinship care in England through to their transition to adulthood.	£124,716
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Institute for Public Policy Research – UK wide To use community-based research to improve understanding of how integration occurs in communities, leading to changes in local and national policy and practice.	£46,500
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Kinship Care Northern Ireland – Northern Ireland Core funding to help and support children and young people in kinship care, informing public policy and practice, and building organisational capacity.	£181,810
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Music in Detention – Multi-regional Core funding to improve communications and implement a new fundraising plan that targets individual donors.	£110,000
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On Road Media – Multi-regional To fund 'All About Trans: Patchwork' testing how young people can influence the way the media reports trans issues and stimulating a wider youth-led movement.	£57,667
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Project Art Works – UK wide Core costs for three years to support the organisation to widen its funding base while increasing its profile and wider influence, through communications and marketing.	£209,991
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Sheffield Methodist District/Who Is Your Neighbour – Yorkshire and Humber To conduct safe space dialogues about difficult issues and difference among communities being targeted by far-right groups.	£67,000
Student Action for Refugees – UK wide Support for STAR Students of the World's core educational activities and to expand the involvement of young refugees across the organisation.	£150,000
The Federation of London Youth Clubs – London To improve the quality of community-based youth work across London through professional development for youth leaders.	£78,051
The Migration Observatory at the University of Oxford – UK wide Public dissemination of data, analysis and original research on UK migration.	£145,000
The Royal Society for the Arts – UK wide To support 'Being and Becoming: The Hidden Wealth of Adolescence', a scoping review to help us think about a wider inquiry into 'the condition of youth'.	£20,000
The Runnymede Trust – Multi-regional Supporting the managed closedown of the organisation over six months.	£30,000
Transform Justice – UK wide Funding work in partnership with the Criminal Justice Alliance and the Standing Committee of Youth Justice to improve the campaigning and influencing effectiveness of the criminal justice sector.	£74,500
University of Kent – UK wide To develop 'Keep Safe', an accessible, group treatment programme for children with learning disabilities and harmful sexual behaviour.	£84,391
UpRising – Multi-regional To run leadership programmes for talented young adults to equip them with the attributes needed to transform themselves and their communities for the better.	£200,000
User Voice – UK wide Support for infrastructure capacity building and core costs.	£120,438
Open Grants total	£2,556,694
Social Justice programme total	£2,922,073

Children of migrant sugar cane labourers in Maharashtra state. Each year thousands of workers in Maharashtra move, often with their families, to find work in the sugar cane plantations of Marathwada. Migrant workers live in extreme poverty, with no support or access to their rights. Children are often taken out of school, damaging their education and long-term prospects. Day centres like this were created to provide education to these children.

India





India programme

Report

This year heralded the initiation of the new India programme strategy. The strategy provides us with some key new directions. One element of the strategy was the need to focus more on drawing learnings from the work we have funded. It also rationalises the programme areas and stresses the need to work on enhancing the human and institutional capacities of the development sector.

The strategy identifies four thematic areas that will receive special attention and a proactive approach. However, we are continuing to support predominantly through Open Grants, which have positioned PHF as a supportive funder in the country.

The strategy also provides greater width to the programme in India by proposing to fund work at the macro and meta levels, including research and policy advocacy, which may build on the direct work done with vulnerable communities. It also provides space for working in collaboration with other organisations to achieve strategic goals.

‘Lost Childhoods’

The first of our new thematic initiatives to be taken up focuses on work with children who leave home and whose lives come to centre around the railways. Following a detailed study on the subject, we published a report, *Lost Childhoods*, outlining activities in this area.¹ During 2013/14 we funded three organisations in this field. We are continuing our proactive approach to identify and fund organisations that bring special understanding of the problem, and are able to address at least one of the many issues identified as having a bearing on the lives and future of children in contact with the railways.

Learning and sharing are important components of our work under this theme. To facilitate sharing between partners, a seminar was organised in association with Railway Children – a UK-based charity that has also been supporting work in this area. Discussion at the seminar focused on the key aspects of the issue, particularly the need for better documentation of the work that is being done and a stronger focus on creating evidence of the experiences that NGOs have had in working with children in contact with the railways.



Street children on the Indian railways. The India programme’s new strategy includes a focus on particularly vulnerable groups, starting with ‘railway children’.

¹ *Lost Childhoods* is published on our website

Participants agreed that this was a crucial gap, which was particularly felt when dealing with government and advocating for policies that recognise the situation of these children.

Another area of concern was the need for reassessing the effectiveness and efficacy of the processes for returning children to their homes. Of the new grants we made this year, two particularly look at this aspect. We expect that over the period of the grants some more proactive and creative approaches to home restoration will be developed as part of the work done by NGOs.

Following some path-breaking work done by PHF partner National Institute of Women, Child and Youth Development (NIWCYD), the issue of young runaway girls in contact with the railways was discussed. This issue has been overlooked in many cases and NIWCYD’s experiences of working with girls threw new light on the subject. Partners at the seminar took these ideas away with them and are expected to review their work on platforms. Drug abuse by children on the railways was also expressed as an area of concern. The Foundation’s role in facilitating dialogue and discussion on the issue was welcomed by partners. We expect to facilitate many more such discussions as work on the theme develops.

The coming together of the partners was also a first step towards the evolution of a coalition that can work in concert to help highlight the plight of children in contact with the railways so that it is of national concern, thereby encouraging and, if necessary, influencing action by the relevant departments of the Government.

Coordinated support

Another example of joining forces to address issues was seen in the Marathwada region of Maharashtra. Three PHF grantees located in the area have been working on issues such as labour migration, education and most importantly the abject disempowerment of women. The organisations decided to pool their strengths to form a common front on the issue of women's empowerment and migration from the region. We encouraged such a move, and our partners are hopeful that their experiences can together make a significant impact on the social and economic factors that are at the root of poverty and deprivation in the area.

The three organisations are featured as case studies in this Yearbook.² They represent the preferred bias of the PHF India programme to provide sustained support to small and remotely located organisations addressing critical issues, thereby helping them play important roles in representing the voices of the people.

Committee visit

The Programme Committee meeting held in Bhopal in the central Indian state of Madhya Pradesh in February 2014 was an opportunity for committee members to experience some of the work being undertaken by partners. Committee members visited three organisations.

Sangini in Bhopal has been working with female domestic labour in the city and is being assisted by our grant to collectivise domestic workers and thereby help them to demand better working conditions and wages. The members of Sangini shared their life stories through small skits as a precursor to an interesting and involved discussion with the committee. The meeting was held in a public park in the city.

Members then travelled to Betul district to understand the work being done by Gramin Vikas Sanstha. GVS has been helping poor communities access their right to employment and through the employment guarantee programme has helped them to revive their livelihoods by making strategic investments into their land and resources. They also visited Pradeepan, which has been working with forest communities to help them access their traditional rights to forests and resources – made possible through an Act of Parliament.

Both visits provided trustees and advisors with an opportunity to connect directly with partners. The village visits helped them to gain insights into the lives of people in rural communities, their livelihood conditions and concerns. The experience also helped them to understand how small but enthusiastic local organisations, led by committed and sincere individuals, are able to make a change and help communities to realise their potential and feel empowered.

The India Programme Committee approved 21 Open Grants and three 'theme' grants, as well as an emergency grant for disaster management, during the year, amounting to £1,360,082. Of these, 11 grants were to new organisations and 14 were renewals. With this, the total number of partners being supported by PHF India at the end of the financial year was 53.

The PHF India team saw a change of guard in the Eastern Region. Shwetank Mishra, who is based in Patna, replaced Veena Lakhmalani, who relocated out of the eastern region. Shwetank brings to the team his experience of working with children on railway platforms in Mumbai and a nuanced understanding of issues related to child rights and protection.

Sachin Sachdeva
Director, India

² See pp.46–47

India programme

Open Grants scheme

Janvikas Samajik Sanstha (JVSS)

£14,446 over one year awarded in 2008/09, £18,084 over one year awarded in 2009/10, £54,505 over two years awarded in 2010/11, and £49,055 over two years awarded in 2012/13



Children of migrant labour at a day centre where they are able to continue their education.

Marathwada in Maharashtra is a major centre for the sugar cane industry. Despite the availability of mechanised methods, sugar cane cutting remains labour-intensive and workers and their families are frequently exploited. Whole families migrate for several months at a time to live on sugar cane farms. There they live in makeshift shanties, with no protection from the harsh weather. There are no toilets or sources of drinking water, and the sites are hotbeds of misery and disease.

Janvikas Samajik Sanstha (JVSS), an education charity, works to get children who have been taken out of school to work on the farms back into education. To achieve this, it set up children's day centres in local villages, leading to over 2,500 children rejoining schools. However, the day centres were not available to the large numbers of children migrating with their families.

Through a sustained effort, working with parents, school teachers and care providers, JVSS pioneered the idea of seasonal residential hostels in the workers' home villages. With our support, JVSS was able to set up the hostels and secure government funding to continue running them.

The schools take responsibility for children during the day, and, if necessary, make accommodation arrangements for the child while their parents are away. Classrooms are converted into makeshift dormitories.

Since initiating the idea three years ago, JVSS has been able to hold back over 20,000 children from going with their parents to the sugar cane farms. Parents were initially hesitant to leave their children behind. However, JVSS managed to build their confidence in the scheme and assure them that their children would be safe and looked after.

There is now growing demand from parents in other villages to set up similar hostels. This year, JVSS will seek to reach even more children to keep them in education. PHF support of the initiative is in its fifth year.

Gramin Mahila Vikas Sanstha (GMVS)

£11,501 over one year awarded in 2010/11, £11,212 over one year awarded in 2011/12, and £31,432 over two years awarded in 2012/13

Samaj Vikas Sanstha (SVS)

£10,778 over one year awarded in 2009/10, £40,405 over two years awarded in 2010/12, and £38,785 over two years awarded in 2012/13



Mass migration of families to the sugar cane fields in Marathwada.

The Foundation has been funding GMVS and SVS to address another negative aspect of the seasonal migration of sugar cane cutters, namely violence against women.

When labour migrates, men, who make the deals with the contractors, include all family members to increase their income. The social systems in Marathwada permit men to marry more than once and there is often more than one wife in the contract. These contracts are not written down and are only explained orally. Many of them break almost every law of the land.

Women's work at the sugar cane fields comes on top of taking care of the family. Exploitation of women occurs throughout the time families are at the sugar cane fields, and continues when they are back. On return, the additional wives are 'released'. Desertion is a common phenomenon in the region. In most villages in Marathwada almost 10 per cent of the population is made up of single women.

Back home with no work through the summer months, men spend a lot of time and money on alcohol. Wife beating and other forms of violence against women tend to rise during this period.

GMVS and SVS have identified this as a major focus of their work. PHF has supported both organisations over the past five years to understand, analyse and address the issue. Through creative mobilisation of women, support through the legal system and the formation of village-level support and vigilance groups, these initiatives have been able to make a difference.

GMVS has created 'zero-tolerance zones' for gender-based violence. It has also mapped the extent of violence and forms of discrimination against women and adolescent girls, as well as documenting their coping mechanisms. It has engaged with government officials, including the police, protection officers and state-level bureaucrats to understand the underlying causes of violence and develop a plan to overcome it.

SVS has particularly focused on invoking the Protection of Women from Domestic Violence Act, 2005, and providing legal aid to women. Work in 100 villages has shown positive impact. Cases of marital discord, domestic violence, rape and forced child marriages have been reported and registered.

The organisation has been using street theatre and other forms of communication to create awareness among communities. It has worked proactively with village-level violence-redress committees to restructure the membership and ensure they act more impartially and judiciously. Representation of women from all castes and vulnerable groups has been ensured.

JVSS, GMVS and SVS have all had enriching experiences from their work in the Marathwada area. With our encouragement, the three organisations have come together to share their experiences, learn from each other and develop a common agenda to address the issue of violence against women. They are also addressing how migration can become less exploitative.

The three organisations have created a niche in the region by working closely with the police. They have been given space at the police station for counselling victims and perpetrators.

Staff from the three organisations are now members of committees addressing issues related to gender-based violence, education or marginalised communities in the districts.

India programme

Grants awarded in 2013/14

Themes

Runaway Children and Child Labour

National Institute of Women, Child and Youth Development (NIWCYD) Child protection initiative on railway platforms of Madhya Pradesh – Theme Lost Childhood	£97,850 Rs. 9,783,028
New Alipore Praajak Development Society Muktangan – Open Centre for Children on Railway Platforms	£93,496 Rs. 9,347,674
Training Awareness and Behaviour Change about Health and Rehabilitation Society Initiative to strengthen child protection mechanisms in Rajasthan	£59,214 Rs. 5,920,204
	£250,560
	Rs. 25,050,906

Open Grants

Chetna Vikas Providing supplementary classes for children to help them cope with school and accelerate learning in a remote, rural area with tribal communities.	£58,848 Rs. 5,883,647
Community Development Centre To scale up the experience of promoting horticulture at a larger level and demonstrate its success as an alternative livelihood for communities in protected areas.	£30,992 Rs. 3,098,568
Comprehensive Rural Health Project To create a community-based infrastructure that provides for and supports mental health.	£22,500 Rs. 2,249,541
Ekta Parishad Trust To strengthen a women's collective in Sabur through training in leadership skills and awareness of key laws and entitlements.	£20,897 Rs. 2,089,258
Gopabandhu Seva Parisad Continued funding for the protection of children from the Penthakotta slum community from child sex tourism on the Puri beach.	£62,197 Rs. 6,218,470
Goranbose Gram Bikash Kendro To address the issue of trafficking and other forms of sexual violence and exploitation. To increase rate of convictions and to initiate a range of preventative measures.	£29,952 Rs. 2,994,589
Gramin Vikas Sanstha To continue the development of a process to simplify and ease access to funds for asset development and help families develop sustainable livelihoods.	£44,513 Rs. 4,450,352
Gramya Vikas Trust To create a local women's institution with the ability to provide financial and technical support for livelihoods and give women the support and reassurance of collective action.	£27,316 Rs. 2,731,003
Iswar Sankalpa To identify homeless people with mental health issues in Kolkata, work on a treatment and self-care regimen and involve support programmes for rehabilitation.	£90,000 Rs. 8,998,164
Jai Baharati Shiksha Kendra To create a local women's institution with the ability to provide financial and technical support and help them to break away from traditional moneylenders.	£10,020 Rs. 1,001,796
Jan Chetna Manch, Bokaro Continued funding to mobilise women's self-help groups to link with Panchayats so that they can become more responsive.	£60,053 Rs. 6,004,067
Kolkata Sanved Continued support for the establishment and use of dance movement therapy in rehabilitation in government shelter homes. Funding for evidence collection.	£73,345 Rs. 7,333,024

North East Research and Social Work Networking (NERSWN) A final grant to consolidate work on community health and use the community platforms created to work on building peace between the communities.	£64,094 Rs. 6,408,056
ODR Collaborative Facilitating a community-led approach to reconstruction and rehabilitation in Uttarakhand.	£48,103 Rs. 4,809,317
Research Academy for Rural Enrichment To undertake rehabilitation of people with disabilities and make the community and government systems sensitive and responsive to disabled people.	£70,527 Rs. 7,051,261
Resource and Support Center for Development For the continued mobilisation and training of elected women representatives so that they can overcome barriers to playing active roles in Panchayats.	£74,294 Rs. 7,427,847
Ruchika Social Service Organisation Continued support to provide supplementary education, and to work with communities to make the Right to Education Act a reality for children living in the slums of Bhubaneswar in Odisha.	£97,122 Rs. 9,710,189
Sangini Mahila Kalyan Samiti To advocate with government, to enact laws that give recognition and dignity to paid domestic work as labour.	£52,316 Rs. 5,230,533
Society for Rural Urban and Tribal Initiative Ongoing support for a Fellowship Programme for leaders of rural people's movements for justice.	£122,889 Rs. 12,286,424
Spandan Samaj Seva Samiti Funding to address the structural cause of hunger, revive traditional crops and improve livelihood security among the Korku, a tribe of traditional hunter gatherers.	£21,252 Rs. 2,124,773
Stree Mukti Sanghatana To organise women waste-pickers into self-help groups so that they can access micro-credit and be recognised as a business entity.	£16,568 Rs. 1,656,487
YUVA – Youths Union for Voluntary Action To reintegrate children from poor families, forced to work in Jharkhand coal mines, back into school.	£11,724 Rs. 1,172,165

Open Grants total **£1,109,522**
Rs. 110,929,531

India programme total **£1,360,082**
Rs. 135,980,437

Other grants

The Helen Hamlyn Trust

£2,000,000 in 2013/14

The Helen Hamlyn Trust is an independent grant-making trust. It focuses on the initiation of medium- and long-term projects linked to the shared interests of Lady Hamlyn and her late husband Lord Hamlyn.

The Trust's core ethos is to develop innovative projects, which aim to effect lasting change, improve quality of life and create opportunities to benefit the public. The Trust establishes lasting relationships with leading organisations and individuals to enable new areas of work to develop. Small grants are given to local and regional charities up to £10,000 meeting the Trust's strict criteria.

This year, amongst other projects, the Trust has continued its work with:

- The Hamlyn Centre for Robotic Surgery and The Paul Hamlyn Chair of Surgery at Imperial College London.
- The University of Oxford Bodleian Libraries supporting the Helen Hamlyn Trust Treasury in the Weston Library.
- The Open Futures Trust (www.openfutures.com). Open Futures is an enquiry- and skills-based learning strategy for schools. The programme integrates inspiring, practical and relevant experiences into the heart of the school curriculum. Throughout our school network we have seen improved attainment, behaviour, attendance and physical and emotional well-being.
- The Helen Hamlyn Centre for Design at the Royal College of Art, (now enshrined within the RCA's constitution in perpetuity).
- Helen Hamlyn Chair of Design at the RCA.
- Research into Optic Nerve Repair and Regeneration to Restore Sight at Moorfields Eye Hospital.
- The LSO/Panufnik Composition Scheme.
- The Paul Hamlyn Christmas Family Treat at the Royal Opera House.
- Setubal Music Festival, Portugal – a partnership with the Municipality of Setubal, bringing together young people from different ethnic communities through a music development programme.
- INTACH – the Reuse of Reis Magos Fort, Goa.
- Cultural Development at Nagaur Fort, Rajasthan.

Grants awarded in 2013/14

25th Anniversary gifts

Paul Hamlyn Clubs

Citizens Theatre Limited Paul Hamlyn Club programme	£500,000
Hall for Cornwall Trust Paul Hamlyn Club programme	£500,000
Opera North Paul Hamlyn Club programme	£500,000
Royal Liverpool Philharmonic Society Paul Hamlyn Club programme	£500,000
Sherman Cymru Paul Hamlyn Club programme	£500,000
Support costs	£17,567
	£2,517,567

The Reading Agency

25th Anniversary gift for the Reading Activists Challenge Concept	£1,000,000
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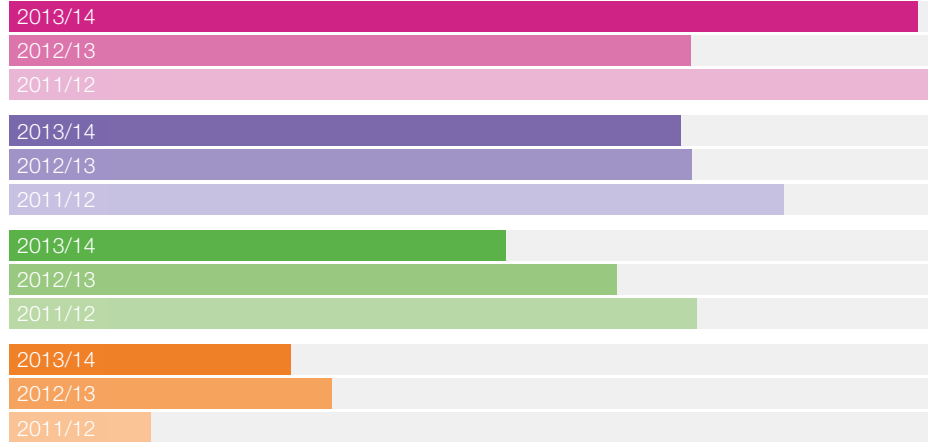
Total **£3,517,567**

New Philanthropy Capital Towards the Inspiring Impact initiative, which works to improve evaluation throughout the third sector.	£10,000
The Helen Hamlyn Trust Support for the Helen Hamlyn Trust 2013/14.	£2,000,000
Exchange rate adjustments	-£34,341
Other grants total	£5,493,226

Analysis of programme awards (excluding other awards)

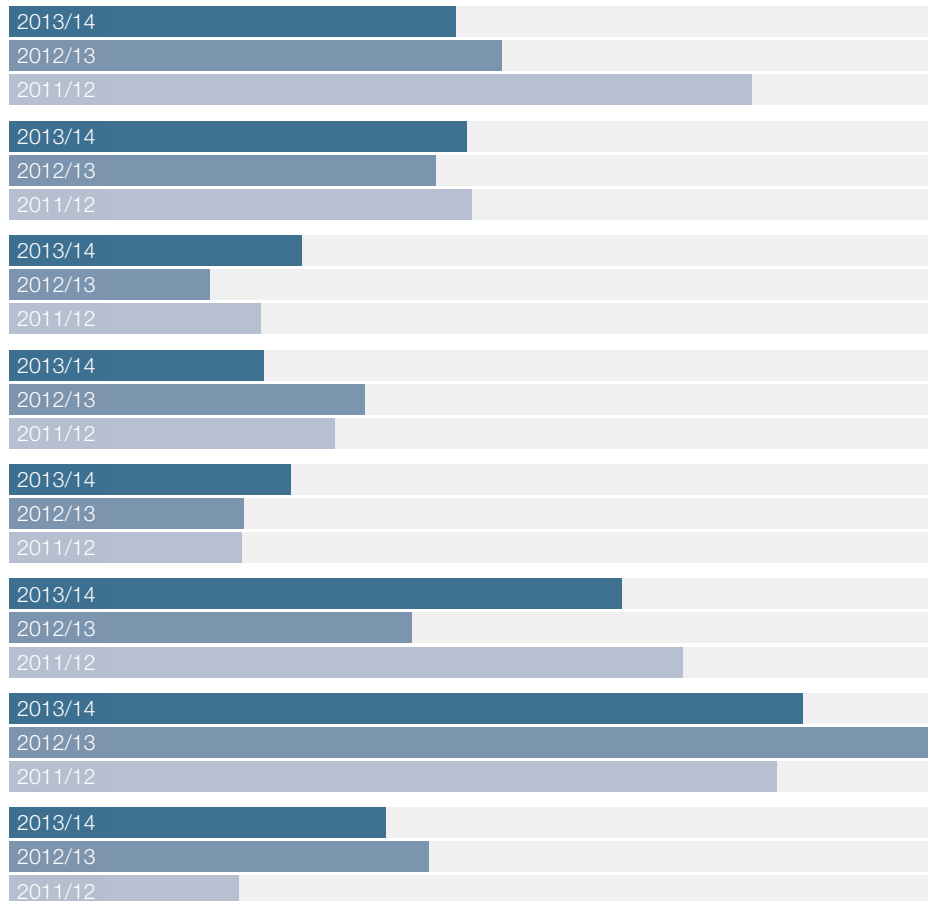
Grant-making summary

	2011/12	2012/13	2013/14
Arts	£5,961,024	£4,257,347	£5,900,946
Education and Learning	£4,934,647	£4,271,900	£4,196,153
Social Justice	£4,301,283	£3,728,738	£2,922,073
India	£354,585	£1,662,178	£1,360,082
Total	£15,551,539	£13,920,163	£14,379,254



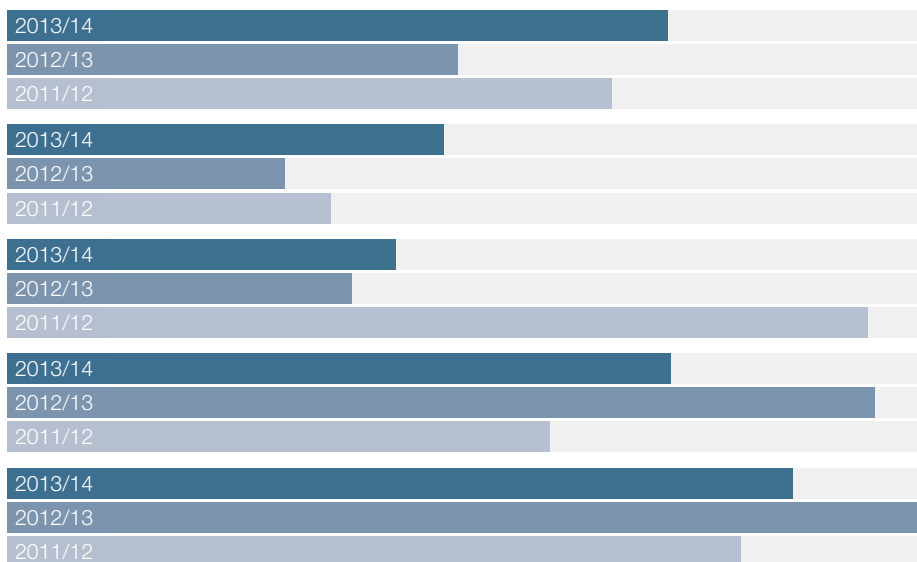
Geographical area served

Area	2011/12	2012/13	2013/14
England (outside London)	£3,886,686	£2,167,153	£1,841,441
London	£1,956,519	£1,703,297	£1,931,715
Northern Ireland	£501,537	£149,492	£786,602
Scotland	£1,012,720	£1,216,999	£522,672
Wales	£368,600	£380,713	£713,780
Multi-regional	£3,411,584	£1,543,609	£2,986,828
UK national	£4,059,308	£5,096,722	£4,236,134
India	£354,585	£1,662,178	£1,360,082
Total	£15,551,539	£13,920,163	£14,379,254



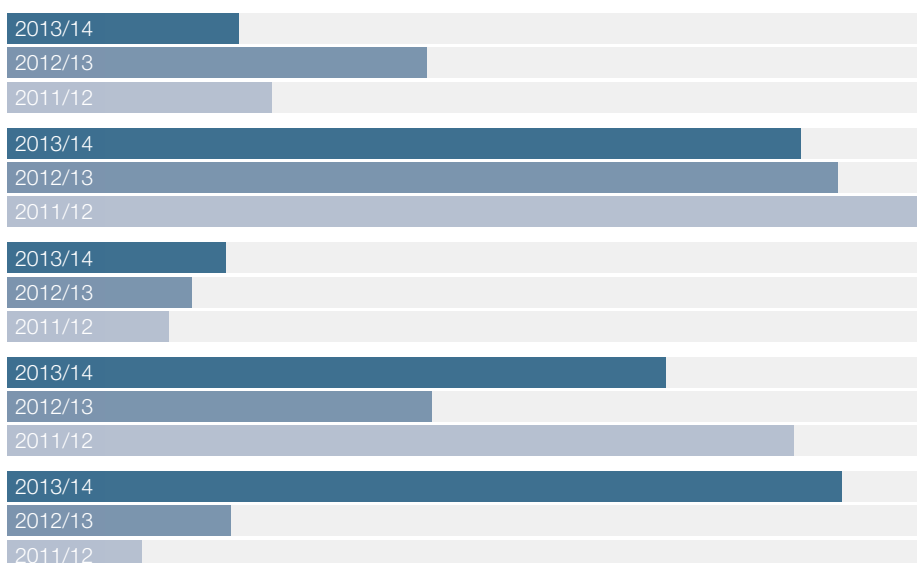
Distribution of funding by focus

Focus	2011/12	2012/13	2013/14
Participation	£3,151,187	£2,064,024	£3,308,347
Professional development	£1,314,024	£1,047,418	£1,988,749
Service improvement	£4,495,389	£1,440,138	£1,701,758
Social inclusion	£2,851,141	£4,536,287	£3,329,191
Multiple/ other focus	£3,739,798	£4,832,296	£4,051,209
Total	£15,551,539	£13,920,163	£14,379,254



Distribution of funding by age group

Age group	2011/12	2012/13	2013/14
Children (0-11)	£1,440,451	£2,806,466	£1,152,904
Young people (12-30)	£7,213,727	£6,441,769	£6,117,469
Adults (31-64)	£534,876	£721,230	£1,028,992
Multi-age groups	£6,059,651	£2,850,777	£4,920,233
All ages	£302,834	£1,099,921	£1,159,656
Total	£15,551,539	£13,920,163	£14,379,254



Impact report

Evidence for learning

In last year's Yearbook we reported on our 'impact map', showing the outcomes of work funded between 2007–12. We produced the map by retrospectively coding the outcomes of individual projects and grouping them to provide a big picture of the difference made by PHF grantees and initiatives. We have found this helpful in several ways. It illustrated the limitations of trying to assess impact from halfway through a strategic period, rather than building it in at the beginning. It also pointed to the drawbacks of broad strategic aims, as PHF has been working to, when it comes to building sufficient evidence from which to learn about impact in any particular area.

As we develop our new strategy, we are focusing on how to help grantees get more useful data and use it to improve the effectiveness of their work. To become a 'learning organisation' – making good use of evidence to inform decisions – is a considerable challenge for most organisations (PHF included). Part of meeting the challenge is recognising the difficulties of evaluating complex activity, and therefore understanding the capacity needed in terms of skills, resources, commitment and culture.

These issues are not ours alone. We have been working with others – grantees, partners and other funders – whose strategies are different but who often face fundamentally the same question: how to secure and use evidence to get the most from their resources. This year we supported Inspiring Impact, and joined its funders' group, convened by ACF, to develop principles for foundations to complement the Code of Good Impact Practice for third-sector organisations. When I spoke at the launch of the funders' principles in June 2013, there was clearly momentum behind making progress in this area. The challenge now is to integrate this thinking fully into our work.

Grantee and applicant feedback

In summer 2013 we received the results of an independent survey of grantees and unsuccessful applicants, conducted by the Center for Effective Philanthropy (CEP). The surveys provide feedback on a range of questions concerning how helpful we are in supporting grantees to achieve the public benefit they aspire to. This includes our processes, communications and accessibility, and the amount and type of funding and non-monetary support we provide.

This was the second time we commissioned the Grantee Perception Report (GPR), making PHF the first UK foundation to follow up on earlier results (from 2009) to see how things had changed. As we reported on our website,

we saw some progress and some disappointments. The new findings provide a baseline for PHF as we develop modes of working to implement our new strategy. We will seek grantees' perceptions of these in due course.

This was also the first time that a UK foundation had commissioned CEP to carry out a survey of unsuccessful applicants. As a direct result of findings from the Applicant Perception Report (APR), we introduced a new feedback system for UK applicants whose requests were declined at the first stage of our two-stage process. We hope in time this will help to strengthen the quality of applications, as the APR also told us that 87 per cent of declined applicants would consider applying again.

Fitter for Purpose

This year we continued to evaluate Fitter for Purpose, a pilot programme of support for organisational development, begun in 2012. This had its origins in the 2009 GPR, where grantees called for more non-monetary support.

Most of the 28 grantees in the pilot have now completed the work with consultants appointed through the National Council for Voluntary Organisations (NCVO), who helped them to focus on what their organisation needed to strengthen it through times of austerity and turbulence. Already we can see the value of grantees and consultants investing time in the initial diagnosis and scoping stage of the work. Often, approaches to the most pressing problems, such as fundraising or impact assessment, need to start with fundamental issues relating to strategy or governance. Initial feedback from grantees has been positive but the impact of the work will take time to show. We will continue to monitor at six and 18 months after the consultancy has finished.

An Evaluation Roundtable

During the year we worked with the Institute for Voluntary Action Research (IVAR) and the US Center for Evaluation Innovation on the UK's first Evaluation Roundtable. This approach to collaborative learning about evaluation was developed for US foundations and involves working on a 'teaching case' – the story of a real evaluation carried out by a foundation. Our evaluation of Learning Away, an Education and Learning Special Initiative, was used as the teaching case for representatives of more than 20 foundations who came together for the Roundtable gathering in March.

Learning Away illustrates the many challenges experienced by foundations in designing and evaluating programmes to tackle complex problems, especially those involving many stakeholders with different roles, information needs and perspectives. Insightful discussions at the Roundtable

The types of grant we make, and what we can learn from them



focused on the key decision points in the life of an evaluation and how to feed these into strategic thinking for the foundation. We hope the Roundtable process will run again, with other foundations sharing teaching cases.

A PHF grants framework

Like many of PHF's Special Initiatives, Learning Away, which began in 2009 and runs until the end of 2014/15, has evolved through phases, from initial exploration of the issues, through the development and testing of different interventions, to the sharing of findings and advocacy for wider change. These phases illustrate the different purposes of the work we fund, whether through Special Initiatives or Open Grants. We have developed a framework of different types of grant to help us think about how the purpose of the work determines the type of evidence grantees need in order to manage the work and decide how to take it on to the next phase.

The framework identifies four broad purposes of PHF-funded work, as shown in the diagram above.

For some time, PHF has asked applicants to describe the intended outcomes of their work and how they would measure them. Once an application is approved, we discuss and agree these outcomes and targets. Consideration of which category a grant falls into within our framework can guide these decisions and help to produce the sort of data that is needed to inform choices about whether and how to move the work on to the next stage, or purpose.

Learning or accountability?

This application of a grants framework is one illustration of the way we intend to use evidence and evaluation within the new strategy for PHF – to help us and grantees collect better quality, more useful evidence that can inform next steps and future strategy. We recognise that, especially in times of austerity and public-sector commissioning, evaluation can be seen primarily as a means of accountability and demonstrating value. Instead, we hope that we can become more adept at using evidence to learn and improve effectiveness. Sharing of information and transparency about our evidence and decisions will be an essential part of this.

Jane Steele

Head of Impact and Evaluation

Financial review

Investment Review

In terms of markets, we are, to a certain extent, in uncharted waters. Since 2009 Central Banks have injected unprecedented amounts of money into the world's economies to help stimulate growth. Interest rates may soon start to normalise. The liquidity tap is being turned off.

After strong returns in 2012 and into 2013, this year markets reacted differently to this prospect. There was a bifurcation in market returns between the developed economies that overall made forward progress and the markets of the developing world that were in sharp retreat. At PHF we continued with our policy of being cautiously invested and as a committee we thought carefully about not only trying to maximise returns but about our overall risk budget. The total size of the fund was £615.5m at 31 March 2014.

The Foundation's investment policy is to maintain in the long run the real purchasing power of the Endowment fund; invest in a diverse range of assets which are most likely to give good total returns in the long term, in order to maximise the total real value of the amounts available for grant-making and other work; and manage volatility as far as possible, while accepting that a degree of volatility is concomitant with seeking high returns.

Our policy is that real spending at 3.5–4% pa is reasonable in the medium term, although demanding in an era of low nominal returns. Review of this work is ongoing, particularly if markets prove to be unrewarding over a period of years, although any decision to alter the agreed level of spending would not be taken lightly.

The Finance and Investment Committee continues to run a highly diversified portfolio. Overall exposure to equities was 47% versus 51% last year. Alternative investments currently stand at around 28% of the portfolio versus 22.8% last year. About 9% of the portfolio is in property and index-linked bonds versus 10% last year. Conventional bond exposure is low at 7%, unchanged from last year. The balance of the portfolio, 9%, the same as last year, is held in liquid investments.

During the summer of 2013 we carried out a major investment review. We looked at: short, medium and long-term performance, both in absolute numbers and against peers; the pros and cons of the classic 'Endowment', the multi-asset model, what it costs and how it behaves; our existing roster of investment managers and some possible changes; our supplier partners and advisors including our lead consultant firm; what we do and how we do it from the perspective of our governance structure.

Portfolio developments in the past year were as follows:

- We sold the last of our UK index-linked bonds as they had become very richly priced.
- We continued to fund our commitment to private equity, including venture. This is beginning to return cash.
- Our listed equities bias continued to be weighted towards the largest capitalisation companies. Overall we made two changes of manager amongst our long-only portfolio, which was more than usual and reflects the strategic review.
- In property our core holding remains the specialist Charity Property Fund, which had another solid year. We managed to find liquidity for one of our small European closed end property funds which have been disappointing from the outset.
- Our hedge fund portfolio continued to prosper, outperforming its medium term benchmark. We continued to build out its exposure, and changed three managers.
- In a year when sterling trended stronger, we held too many US dollar denominated investments and this modestly hurt our overall return. We reviewed our currency management strategy and operating procedure.
- European equity manager Rod Jack joined our Investment Committee as a special advisor, sitting alongside Simon Gillis, Paul Woolley and Lord Gavron.

During the year, we decided to offer a loan to one organisation which is also a current grantee – BeatBullying – and this is reported as a programme related investment in the balance sheet. As part of its strategy review, the Foundation is considering whether it wishes to pursue programme-related investment in a wider way.

The Foundation's Endowment investment portfolio rose by +4% for the financial year to 31 March 2014. Over the last five years to 31 March 2014 PHF has advanced by +56.3% versus an advance of our putative benchmark (UK Retail Prices Index plus 4% pa) of +45.7%.

Expenditure

Grants awarded before adjustments fell by 26% compared with 2012/13 but 2012/13 was an exceptional year as it included c£11m of grants to mark the Foundation's 25th anniversary. When 25th Anniversary gifts are excluded in both 2012/13 and 2013/14 the year-on-year change in grants awarded is an increase in expenditure of 2% (£378,000 approx) in 2013/14. Open Grant spend has reduced by £1.5m compared with 2012/13 but Special Initiative

expenditure increased by £1.8m, largely due to the launch of round two of the Breakthrough Fund in 2013/14.

Support costs have reduced by 3% (£85,000) when compared with 2012/13, largely due to some cost savings and changes in patterns of expenditure.

Summarised Financial Statements

Trustees' Statement

The summarised financial statements are not the full annual report and financial statements but a summary of information derived from both the Foundation's Statement of Financial Activities and the Foundation's Balance Sheet. The summarised financial statements contain additional information derived from the directors' report, but that information is not the full text of that report.

The full annual report and financial statements, from which the summarised financial statements are derived, were approved by the trustees on 8 July 2014 and copies have been filed with the Charity Commission and with the Registrar of Companies.

The independent auditors have issued an unqualified report on the full financial statements and on the consistency of the Directors' Report with those financial statements. The statement in the independent auditors' report, under section 496 of the Companies Act 2006, was unqualified. The full independent auditors' report contained no statement under sections 498(2) (a) and (b) or 498(3) of the Companies Act 2006.

The full annual report and financial statements are available free from www.phf.org.uk.

Tim Bunting

Chairman, Finance and Investment Committee

Independent auditors' statement to the members of Paul Hamlyn Foundation

We have examined the summarised financial statements which comprise the Summary Statement of Financial Activities and Balance Sheet set out on page 56.

Respective responsibilities of directors and auditors

The directors are responsible for preparing the Yearbook 2013/14 in accordance with applicable United Kingdom law and the Statement of Recommended Practice: Accounting and Reporting for Charities (revised 2005).

Our responsibility is to report to you our opinion on the consistency of the summarised financial statements within the Yearbook 2013/14 with the full annual financial statements and the Directors' Report and its compliance

with the relevant requirements of section 427 of the Companies Act 2006 and the regulations made thereunder. We also read the other information contained in the Yearbook 2013/14 and consider the implications for our statement if we become aware of any apparent misstatements or material inconsistencies with the summarised financial statements. The other information comprises only the chairman's statement and the other items listed on the contents page.

This statement, including the opinion, has been prepared for and only for the company's members as a body in accordance with section 427 of the Companies Act 2006 and for no other purpose. We do not, in giving this opinion, accept or assume responsibility for any other purpose or to any other person to whom this statement is shown or into whose hands it may come save where expressly agreed by our prior consent in writing.

We conducted our work in accordance with Bulletin 2008/3 issued by the Auditing Practices Board. Our report on the company's full annual financial statements describes the basis of our audit opinion on those financial statements and the Directors' report.

Opinion

In our opinion the summarised financial statements are consistent with the full annual financial statements and the Directors' Report of Paul Hamlyn Foundation for the year ended 31 March 2014 and comply with the applicable requirements of section 428 of the Companies Act 2006, and the regulations made thereunder.

PricewaterhouseCoopers LLP
Chartered Accountants and Statutory Auditors
London
10 July 2014

Note:

The maintenance and integrity of the Paul Hamlyn Foundation website is the responsibility of the directors; the work carried out by the auditors does not involve consideration of these matters and, accordingly, the auditors accept no responsibility for any changes that may have occurred to the full annual financial statements or the summarised financial statements since they were initially presented on the website.

Summary financial statements

Summary Statement of Financial Activities for the year ended 31 March 2014 (Incorporating Income and Expenditure Account)

	2014 Total £m	2013 Total £m
Incoming resources from generated funds		
Investment income	17.829	15.999
Grants receivable	0.090	0.181
Other income	0.016	0.045
Total incoming resources	17.935	16.225
Resources expended		
Investment management	4.387	4.006
Grant-making	22.160	29.336
Governance	0.041	0.069
Total resources expended	26.588	33.411
Net (outgoing) resources and net income for the year	(8.653)	(17.186)
Other recognised gains and losses		
Realised and unrealised gains on fixed asset investments	8.381	58.044
Net movement in funds	(0.272)	40.858
Funds at 1 April 2013	600.418	559.560
Funds at 31 March 2014	600.146	600.418

Balance Sheet at 31 March 2014

	2014 Total £m	2013 Total £m
Fixed assets		
Tangible assets	6.090	6.119
Investment assets	613.345	611.881
Programme related investments	0.238	–
	619.673	618.000
Current assets		
Debtors	0.677	1.819
Other investments	1.035	1.653
Cash at bank and in hand	1.134	1.483
	2.846	4.955
Creditors falling due within one year	(12.128)	(13.607)
Net current assets	(9.283)	(8.652)
Total assets less current liabilities	610.391	609.348
Creditors falling due after more than one year	(10.245)	(8.930)
Net assets	600.146	600.418
Funds at 31 March 2014	600.146	600.418
Represented by:		
Restricted Funds	0.051	0.115
Endowment Funds	–	–
– Investment revaluation reserve	116.300	151.837
– Other endowment funds	483.795	448.466
Total Funds	600.146	600.418

Paul Hamlyn Foundation
A company limited by guarantee registered in England and Wales – number 5042279

Trustees, staff and advisors

Trustees

Jane Hamlyn (Chair)
Tim Bunting
Lord Hall of Birkenhead CBE
Michael Hamlyn
Baroness Kidron of Angel
James Lingwood
Baroness Morris of Yardley
Lord Moser
Sir Anthony Salz
Peter Wilson Smith
Tom Wylie

Staff

Ushi Bagga	Grants Officer, Arts
Denise Barrows	Head of Education and Learning
Rob Bell	Head of Social Justice
Susan Blishen	Right Here Manager
Anna Booth	Communications Intern
Martin Brookes	Director (to July 2014)
Régis Cochefert	Head of Arts
Molly Courtice	Communications Intern, then Administrative Assistant, Arts
Eve Dallas	Grants Officer, Social Justice
Tony Davey	Information and Resources Officer
Sarah Jane Dooley	Grants Officer, Arts
Susan D'Sylva	Finance Officer
Susie Dye	Grants Officer, Social Justice
Mia Ferron	Chair and Director's Assistant
Noelle Gilbert	Grants Officer, Education and Learning
Kate Harding	Strategic Review Intern, then Special Initiatives Assistant, Arts and Education and Learning
Dorothee Irving	Grants Officer, Arts
Maria Karska	Administration Officer
Abigail Knipe	Grants Officer, Education and Learning
Tara LaComber	Project Coordinator, Arts Special Initiatives
Nora Loewenberg	Grants Assistant/Officer, Education and Learning
Angela Melis	Catering Coordinator
Marcello Moro	Finance and Resources Assistant
Rizwan Muhit	Office Assistant – Apprentice
Leah Nuth	Special Initiatives Administrator, Education and Learning, then Grants Assistant, Education and Learning (maternity cover)
Lucy Palfreyman	Finance and Resources Director, Company Secretary
Kay Patel	HR and Administration Assistant
Richard Robinson	Investment Director
Sachin Sachdeva	Director, India
Liz Scott	Accounts and IT Officer
Samantha Smallcombe	Grants Assistant, Social Justice
Jane Steele	Head of Impact and Evaluation
Juliet Valdinger	Grants Assistant, Arts
Dan Watson	Communications Manager
Faye Williams	Right Here Coordinator
Skalzang Youdon	Administrator, India

Advisors

Bridget Anderson	Social Justice
Neera Burra	India
Sir Tim Brighouse	Education and Learning
Kate Brindley	Arts
Fiona Dawe	Social Justice
Lord Gavron	Investments
Simon Gillis	Investments
Sushma Iyengar	India
Rod Jack	Investments
Anita Kerwin-Nye	Education and Learning
Sir Alasdair Macdonald	Education and Learning
Maureen McGinn	Social Justice
John McGrath	Arts
Donald Peck	India
Jonathan Reekie	Arts
Benita Refson	Education and Learning
Claire Whitaker	Arts
Paul Woolley	Investments

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Solicitors

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Credits

Yearbook designed by Red Stone www.red-stone.com
UK Open Grants case studies written by Nicola Hill

Printed on 100% de-inked post consumer waste silk paper, fully FSC certified

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