

# Being a Strategic Funder



# Introduction

The Life Changes Trust was established by the National Lottery Community Fund in April 2013 with a spend out endowment of £50 million. We have used that endowment to support and drive transformational improvement in the quality of life, wellbeing, empowerment and inclusion of three groups in Scotland: people living with dementia, unpaid carers of those with dementia and young people with care experience.

The main ways in which we do this are by:

- ▶ Investing directly in people and expanding the choices and opportunities available to them.
- ▶ Investing in the work of public and third sector partners that champion their inclusion, leadership and rights.

Listening to, amplifying and acting upon the voice of the people we're here for is woven into the fabric of the Trust. Over the past eight years, we have developed a deep understanding about what leads to significant and positive change in people's lives.

As we approach the end of the Trust, we are focused on leaving a positive legacy. In order to do that, it's important that we explain what we do and how we do it, as well as share insights into the impact of working in this way. This funding booklet is one in a series of four:

- ▶ Putting beneficiaries at the heart of funding.
- ▶ Relationship-based funding.
- ▶ Being a flexible funder.
- ▶ Being a strategic funder.

# Being a strategic funder

Grant-making organisations come in all shapes and sizes. Some are very small, with just one employee working to a Board of Trustees; others are very large and operate as a body arms-length to government. An organisation may have been established relatively recently or may have been granted a Royal Charter in the times of Queen Victoria.

To funding applicants, most of these organisations are just ‘funders’. Their chief concern is whether or not their financial needs can be met within the funding organisation’s strategic priorities.

Some funding organisations were founded with very specific purposes in mind, targeted at a small group of people in society that would benefit from financial help. These funders often dispense private income rather than public funds, often relying on income from an endowment rather than spending the capital itself.

Other funders receive regular contributions of public money and can choose to invest in any number of beneficiary groups as long as there is public benefit. Regardless of the size and income of the funder, a well thought-out strategy is necessary so that every penny has a purpose that brings benefit.

A simple strategy asks:

- ▶ What are our overall aims?
- ▶ Which organisations/types of organisations should we fund?
- ▶ How much money do we give them?
- ▶ How long will we fund them for?
- ▶ Does the work we are being asked to fund fit with our stated aims as a funder?
- ▶ How will we monitor progress and evaluate impact once the funding has been granted?

This kind of strategy focuses on doing as much good as possible with the funds available, within the parameters of the funding organisation's goals and ambitions.



# Highly strategic funding

The Life Changes Trust was established to be a highly strategic funder, with specific aims and intended outcomes for the people it intended to benefit over a defined period of time with a specific sum of money.

A highly strategic approach attempts to look into the future and envisage what that future should look like for a specific beneficiary group. It is built on:

- ▶ What people say would make a significant difference to their lives and reflects on the evidence base already available.
- ▶ Relationships and partnerships with like-minded organisations and key individuals who will work with the funder to achieve common aims.
- ▶ A willingness to go beyond grant-making to influence decision-makers based on strong evidence gathered from the work that has been funded.

Highly strategic funders look beyond the pounds and pennies, as important as these are, and see the broader landscape for beneficiaries. They are always seeking ways to add value to the money they have at their disposal, valuing relationships and responding to feedback whilst keeping a steady course.

The Board and staff need a shared understanding of the risks inherent in a highly strategic funding strategy. There must also be a commitment to continuous learning, based on feedback and robust evaluation, so that the strategy can flex within its overarching aims.

A highly strategic approach will need a good number of years to bring about change, so it looks further forward than the typical funding strategy (perhaps decades from now).

As you will see from the approach of the Life Changes Trust, it is not necessarily about funding the seemingly most established organisations. It is about working at all levels – investing in beneficiary voices, encouraging grassroots organisations, providing evidence to statutory organisations and national government – and finding a strategic path through that addresses at all levels the issues most important to the people you are working alongside.



# Developing a strategy

Once the Trust was established as a legal entity, and a Board appointed, work began to develop a ten-year strategy. The first stage was broad engagement with the Trust's beneficiaries and organisations that serve them, both in the public and charitable sectors.

Almost immediately, the Trust's language was altered based on feedback received, and the beneficiary groups were broadened. For example, rather than older people with dementia the Trust decided to reach people of any age with dementia since dementia does not just affect older people. The term 'care leavers' was replaced with the broader descriptor of 'young people with care experience' recognising that care-leaver has a specific legal meaning which is restrictive and does not recognise that care journeys are not linear.

Once feedback from extensive national engagement was collated and analysed, a strategy was presented to the Trust's Board for comment and approval. Most of the Trust's Board members had been present at engagement events.

The National Lottery Community Fund had also appointed a Protector, a retired solicitor, to ensure that the Board adhered to the original aims of the Trust and that Trustees fulfilled their roles appropriately. He also attended engagement events and heard some of the discussion that took place.



# Creating better lives

As well as the engagement events, the Trust placed great emphasis on going to people rather than expecting them to come to the Trust's events. Trust staff spent many days and hours, often outside normal working hours, meeting with young people, people with dementia and unpaid carers to hear from them about their specific needs. It was important that staff knew the job they were taking on was not a normal 9-5, office-based role and were comfortable with that.

All the feedback was distilled down to five priority areas for all three beneficiary groups:

- ▶ I live in a place that suits me and my needs.
- ▶ I am able to be as independent as possible.
- ▶ I get the help I need when I need it.
- ▶ I feel safe, listened to, valued and respected.
- ▶ I am empowered to do the things that are important to me.

Specific pieces of work were planned under each outcome for each beneficiary group but always with the thought in mind that the whole should be greater than the sum of the parts. The individual pieces of work should together accumulate into a strong, interlinked approach that, if implemented by organisations other than the Trust, would benefit young people, people with dementia and unpaid carers for decades to come.

As well as deciding on the work to be carried out, the Trust took a considerable amount of time to consider its approach to funding. Much of this is outlined in the three booklets that accompany this one, which give more detail, but the Trust decided to be a funder that values:

- ▶ Beneficiaries – their rights, relationships and ability to influence positive change.
- ▶ Relationships with beneficiaries and awardees that go beyond the transactional.
- ▶ Flexibility in our approach where that will bring greater benefit to beneficiaries.

This approach requires a certain type of staff team and we have benefited from recruiting people who will go the extra mile and really understand the initiatives the Trust is funding. We have people who will respond quickly to awardees and beneficiaries, discuss any requirements for flexibility and who see their role as more than a job.



# Communication of a highly strategic approach

There was much excitement and interest in the National Lottery Community Fund's decision to establish an organisation that would distribute an endowment of £50 million. Even before the Life Changes Trust was a legal entity in its own right, expectations were very high.

Each programme operated in a different context and it was important that the Programme Directors understood these. The Young People with Care Experience Programme worked in a complex, multi-stakeholder environment with a number of large charities and many smaller charities.

Young people, too, were beginning to find their own voice and this was something the Trust particularly wanted to encourage and enhance as, historically, investment in participation and engagement had been limited.

Public bodies have a set of statutory duties and policy commitments to young people with care experience and, at the time the Trust was established, the Children and Young People (Scotland) Act 2014 was being drafted. It set out a new legal framework within which services were to work together in support of children, young people and families.

This greater emphasis on an integrated approach included:

- ▶ Placing Corporate Parenting duties on a range of publicly funded organisations in respect of looked after ‘children and care leavers’ (the language at that time), increasing the breadth and depth of support available to those groups of children and young people.
- ▶ Extending eligibility to aftercare assistance up to an individual’s 26th birthday.
- ▶ Introducing ‘continuing care’, through which eligible care leavers had the opportunity to continue with the accommodation and assistance they were provided with before they ceased to be looked after.

The new legislation represented a step forward in terms of recognising the need to provide more ongoing support to young people as they transition into young adulthood, just as families do. However, Scotland’s supportive legislative and policy framework for children, young people and families is only one part of the picture. In reality, the practice experienced by many young people fell short of policy aspirations.

The Trust was keen to explore the impact of investing directly in young people, and, in understanding both their needs and aspirations, to show what is possible with the right support in place.

By contrast, the Dementia Programme had fewer organisational stakeholders and considerably less pre-existing infrastructure in Scotland. Although a raft of social care and other law applies to people with dementia and unpaid carers, the main provisions for dementia specifically come in the form of Scotland’s National Dementia Strategy’s policy commitments.

One primary aim of the Dementia Programme was to build a stronger and larger national infrastructure for dementia in Scotland, developing sturdy networks and showing what works best to support people with dementia and unpaid carers after a diagnosis of dementia ('post-diagnostic support'). People living with dementia and the unpaid carers of people with dementia do not necessarily have the same support needs and should not be viewed as one group, which is why they are two separate beneficiary groups under the one programme at the Trust.

At the time the Trust's work began, the **Public Bodies (Joint working) (Scotland) Act 2014 was enacted**, requiring integration across health and social care for adult services. Integration Joint Boards were established to make these requirements a reality and the Trust aimed to influence thinking on dementia policy, strategy and delivery at a local level.

# Approach to Funding

The purpose of the Trust was to independently benefit its beneficiary groups. This work would inevitably sit alongside and support policy-driven plans, but the Trust would act on its own initiative and not be driven by any other agenda.

It might be true to say that the phrase ‘£50 million’ was perhaps foremost in many people’s minds and, without doubt, some people saw the Trust as a very large pot of money to be accessed immediately. The need was great for all three beneficiary groups, but a highly strategic approach was necessary to make the best use of the endowment.

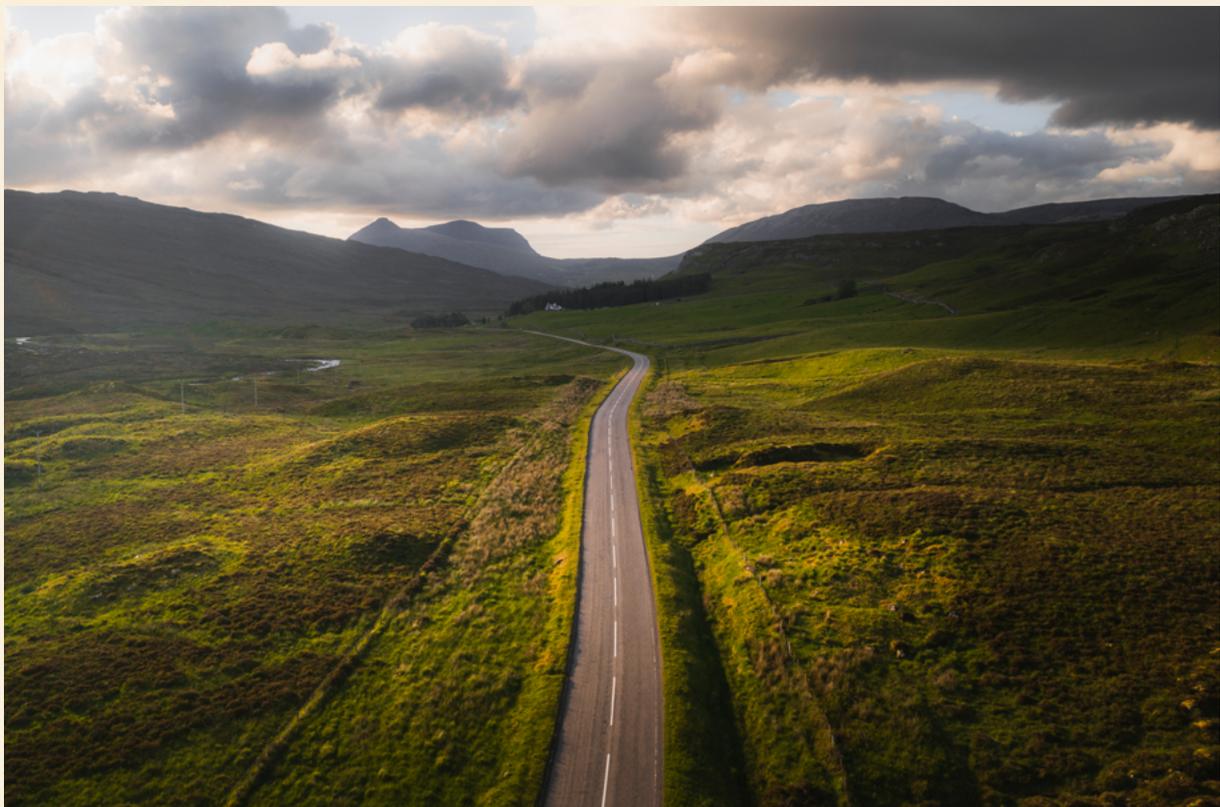
Once funding calls were live, senior staff spent much of their time holding information sessions and travelling around Scotland (Zoom was not a watchword in those days) explaining the Trust’s strategic approach and being very clear about the funding relationship we expected to build with awardees.

Our application forms looked different from those of many other funders. We wanted beneficiaries to be included in application discussions and assessment so we asked for their input on the important questions to ask and requested information in a way that would be useful to them.

We emphasised the importance of early evaluation (self-evaluation and independent evaluation). The Trust was also keen for projects to use emerging evaluation findings to develop the funded work, making changes where necessary and re-aligning initiatives with the desired outcomes if they were experiencing ‘project drift’. We brought in outside support for awardees that were struggling with evaluation and we asked that all projects meet together regularly (arranged and funded by the Trust) in order to learn from each other and network with each other. Feedback from the people involved in projects has shown that these gatherings have been highly valued as a source of peer support, learning and motivation.

We asked for a clear explanation of how the initiative would meet particular outcomes, based on the Trust's five funding priorities. This flummoxed many an applicant, who could articulate their own aims, but not how they would fit with the Trust's aims. Therefore, funding staff had many conversations with applicants to explain how the Trust's funding approach would work.

Eventually, people began to realise that they would need to engage with the Trust's overarching aims and approach in order to succeed in securing funding. They would need to be committed to the bigger picture and work in co-operation with other like-minded organisations, rather than compete against them for funding. Most organisations saw the ultimate value of this approach.



# Funding individuals

Unlike many funders, the Life Changes Trust could make grants directly to individuals. We recognise that people are experts in their own lives and are best placed to decide what can make the most difference to them. During its lifetime, the Trust operated 6 schemes directed aimed at individuals. There is a highly strategic element to funding beneficiaries directly. By doing this the funder:

- ▶ Puts money directly into the pockets of beneficiaries so they can determine what the benefit to them will be.
- ▶ Receives first-hand feedback from beneficiaries which can then inform further work of the Trust and its influencing activities.
- ▶ Enables beneficiaries to bring benefit to each other.

Many funders shy away from funding individuals directly. The approach is seen as labour intensive and fraught with dilemmas. This has not been the experience of the Life Changes Trust. In fact, funding beneficiaries directly has been one of the more straightforward aspects of the Trust's work. It does require to be thought through carefully and there must be consideration of 'what if' scenarios. However, this kind of risk assessment is inherent to any funding programme. Of the 2380 awards made to individuals, only one or two ever caused significant problems and these were easily resolved.

By funding in this way and evaluating the schemes, the Trust believes it has proven beyond any doubt that funding individuals shows respect to beneficiaries, empowers them to improve their own life or life chances, and is no riskier than any other funding scheme.

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## **Dementia Programme – Individual Awards schemes**

Between 2014 and 2018, the Dementia Programme operated a pilot scheme and then a wider scheme focused on individual awards. These schemes provided a small amount of additional financial empowerment to people with dementia and unpaid carers to help improve their wellbeing and quality of life. There was considerable diversity in terms of what the Award was spent on, and the flexibility of the Scheme allowed for creativity of thinking (with support where necessary).

As well as benefiting individuals, this funding was strategic because it was designed to demonstrate how more flexible use of Self-directed Support<sup>1</sup> could be used more effectively to support people with dementia and unpaid carers. Alongside this funding scheme, the Trust funded and published research and case studies on the use of Self-directed Support in respect of dementia.

The evaluation feedback provided by individuals who received an Award, taken together with the research and wider case studies, has provided the Trust and others with a very strong evidence base on how small sums of money can be used to great benefit following a diagnosis of dementia and on an ongoing basis. This is important evidence in light of the Scottish Government's recent Independent Review of Adult Social Care and a potential Fourth National Dementia Strategy.

To read more about these schemes and watch the learning event videos, please go to <https://www.lifechangestrust.org.uk/individual-awards-scheme-evidence-and-learning>

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1 <https://www.gov.scot/publications/guide-social-care-self-directed-support-scotland-act-2013/>

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## **Response to COVID-19: 'Caring for the Carer' fund**

In November 2020, the Trust opened a 'Caring for the Carer' fund to support unpaid carers' resilience during the COVID pandemic. The William Grant Foundation contributed £25k to the fund, and we were very grateful for their support. The fund closed in January 2021 and received 459 applications from unpaid carers. In total, the fund awarded £301,171 with 402 applications (88%) receiving funding.

Ahead of the fund being launched, staff consulted extensively with awardees and beneficiaries to determine how this fund should best be used, particularly given the ongoing nature of the COVID-19 pandemic. As part of building an evidence base, the Trust hosted six online learning sessions with Awardees, beneficiaries and other stakeholders and took the learning from this, as well what had been gathered for our COVID-19 learning report<sup>2</sup>, to determine strategically where funding was best targeted.

The evidence showed very clearly that unpaid carers were significantly negatively affected by the pandemic, clearly illustrating that they did not have access to the range of supports they relied upon to maintain their own physical and mental health and wellbeing.

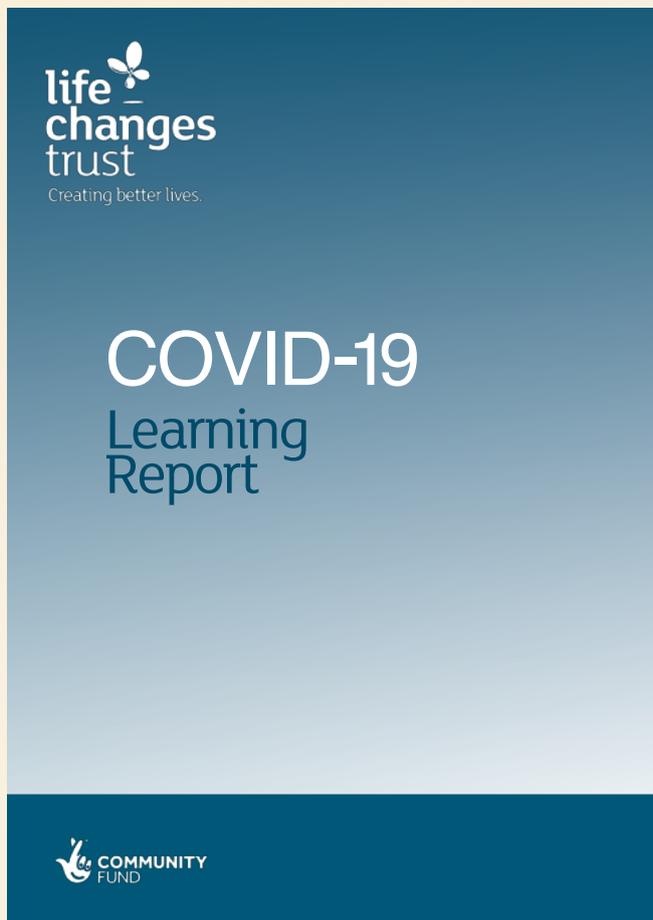
The Trust already had strong evidence of the benefits of small grants to unpaid carers from the Individual Awards Schemes previously and decided this would be the correct approach to take for this fund. Learning was also taken from the 'Keep Well Fund' developed by the Trust's Young People with Care Experience Programme in April 2020, also in response to Covid 19. The 'Caring for the Carer' fund allowed grants of up to £1,000 for unpaid carers to tailor support to their particular needs.

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<sup>2</sup> [https://www.lifechangestrust.org.uk/sites/default/files/publication/files/BOTH%20PRO-GRAMMES%20COVID-19%20LEARNING%20REPORT\\_0.pdf](https://www.lifechangestrust.org.uk/sites/default/files/publication/files/BOTH%20PRO-GRAMMES%20COVID-19%20LEARNING%20REPORT_0.pdf)

Every carer's experience is unique and so a flexible approach was key to be sure of accessibility for unpaid carers, especially at a time where their lives were significantly impacted.

This was a strategic approach to funding as the Trust did not simply react to COVID and its impact, but took time to listen to what the issues were for beneficiaries and decide the best course of action regards funding. The Trust also recognised that a learning report based on the applications to this fund (with consent of unpaid carers) would be powerful and provide further evidence of ongoing need. This report is available on our website.<sup>3</sup>



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<sup>3</sup> <https://www.lifechangestrust.org.uk/sites/default/files/publication/files/1410-Web-Caring%20for%20the%20carer%20report-V04.pdf>

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## Young People with Care Experience Programme - Individual Grant Awards

The Trust has benefitted from working co-productively with a group of young adults with their own lived experience of the care system - the Advisory Group - to design and deliver a number of Individual Grant award schemes, as follows:

- ▶ 2016-2019: Aspirational Awards (national, 21-26 year olds)
- ▶ 2020: 'Keep Well Fund' (national, 18-30 year olds)
- ▶ 2021: My Choice, My Future (national, 18-30 year olds)

The Trust ran a pilot scheme of individual grant awards in 2014 which identified a gap area for young people aged 21-26. The learning from the pilot was shared with the Advisory Group, who subsequently developed Aspirational Awards.

The scheme provided the opportunity for young people to apply for a funding award aimed at thinking 'big' and achieving their ambitions, and supporting their personal development and reaching as high as possible in life. The aspirational idea was to be based on:

- ▶ An ambition or dream which would create a long-term impact.
- ▶ Something which would help achieve a long-term goal.
- ▶ Something that could be worked towards over a period of time.

Trustees devolved the decision-making to the Advisory Group, who developed a high degree of ownership of the scheme. Evaluation has highlighted the positive impact this had on young people who received awards.

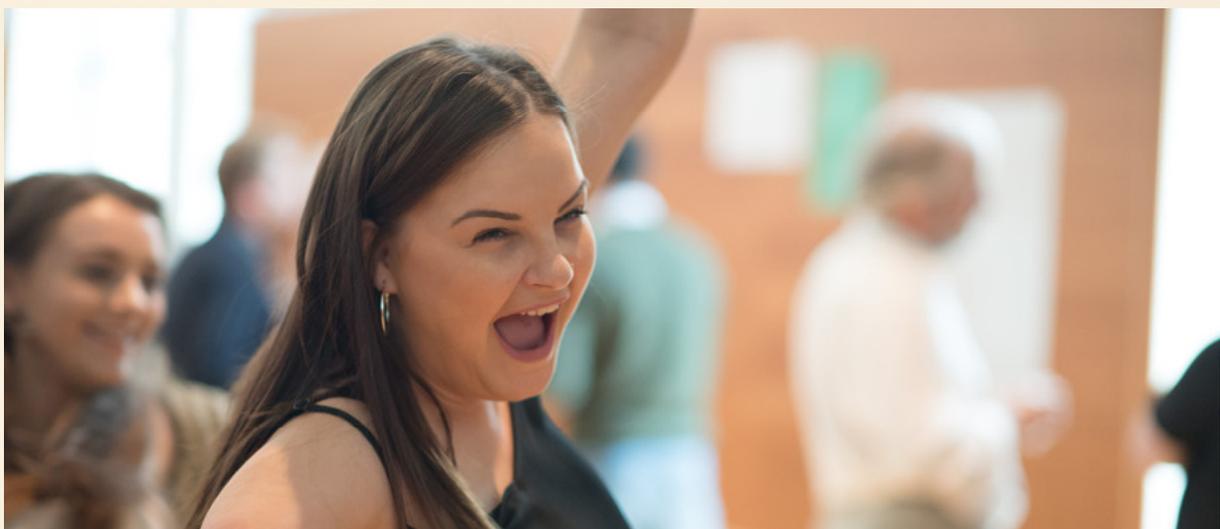
Aspirational Awards were strategic in multiple ways. First, they helped many young people take a step that would set them on a path they might otherwise have been unable to take, offering genuine choices and opportunities. Second, they demonstrate to policy makers and practitioners the immense potential of many young people with care experience and the extent to which they can be trusted to make significant decisions about their own future. Lastly, they demonstrate the ability of co-production to strengthen decision-making when awarding grants. As many funders are now interested in working with people who have a wide range of life experiences, including lived experience, to help them shape their programmes and make better decisions, the Trust's strategic approach to co-production has attracted significant interest.

**Read more about Aspirational Awards and watch the learning event videos**

<https://www.lifechangestrust.org.uk/project/aspirational-awards>.

**Please also see 'Side-by-Side: The Magic of Co-production' for more information on the Advisory Group and Aspirational Awards.**

<https://www.lifechangestrust.org.uk/young-people-care-experience-advisory-group-evidence-and-learning-0>



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## **Response to COVID-19: 'Keep Well Fund'**

In April 2020, the Trust worked with the Advisory Group to coproduce an individual grants response to the impact of the COVID Pandemic. The 'Keep Well Fund' offered small, flexible grants of up to £250 for anything which would support mental and/or physical wellbeing during lockdown. The response was overwhelming, and as we read through each application it was sobering to see the confirmation of much of what we already know – that young people with experience of the care system are affected by inequalities in relation to health, income, digital access, housing and other areas of life. The Trust received 712 eligible applications and in total, the fund awarded £138,272 with 689 applications (97%) receiving funding.

Donations from the Esmée Fairbairn Foundation, the William Grant Foundation, the Cattnach Trust, Cycling Scotland and Inspiring Scotland were all vital in expanding the reach of the 'Keep Well Fund'. We were very grateful for this support.

Our existing experience of delivering individual grants and our extensive networks helped us to respond quickly to the challenges of lockdown and to reach a diverse range of young people.

The input, leadership, challenge and reassurance offered by the Advisory Group at every stage of the 'Keep Well Fund' process was invaluable. Despite the challenges around time and physical distancing, the Trust remained strategically committed to the principles of co-production, and this ensured that we launched an initiative that young people with care experience (and their support workers) could easily engage with.

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## **My Choice, My Future**

Finally, the Advisory Group and Trust staff reflected on the diversity of applicants to the 'Keep Well Fund' as well as the extended reach of the scheme. We decided the time was right to review and redesign Aspirational Awards in light of the experience of the 'Keep Well Fund'.

As a result, in November 2020, the Trust launched a new individual grant award scheme called My Choice, My Future. The aims were to support young people with care experience:

- ▶ Who are trying something new and taking the first steps towards their long-term aspirations.
- ▶ Who have a very clear idea of the next step they need to take in life to fulfil their long-term aspirations.

Taking a strategic approach to co-production with the Advisory Group has supported the Trust to design individual grant award schemes that are flexible and tailored to the needs and aspirations of young people with care experience. It is part of our strategic approach to hand on the baton and encourage others to work in this way. The Trust has established the Young Funders scheme as a means of funding other organisations to co-produce their own individual grants programmes or participatory grant-making schemes with young people. The Advisory Group are working alongside these organisations, offering their support and practical advice.

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## Dementia Programme – Peer-to-Peer Resources

One further benefit of funding individuals emerged as people with dementia asked for funding to create resources that would help and encourage their peers. This began with one individual seeking a very small amount of funding to produce a booklet that would help people with dementia with sensory challenges.<sup>4</sup> She felt strongly that this was an underexplored issue that needed to be spoken about.

The Trust funded her idea at minimal cost and the booklet was published as a collaboration between a number of people with dementia. The Trust stopped counting the number of booklets distributed when distribution reached more than 30,000 copies. The booklet has been translated into five languages and distributed in at least six countries.

The success of this venture led the Trust to open the Peer-to-Peer Resources fund, which was for people with dementia and unpaid carers only. This fund supported 26 highly creative projects that enable people with dementia and unpaid to support their peers.<sup>5</sup>

From the first sensory challenges publication to the range of resources published today, this has been a strategic fund. It not only fulfils elements of Priority 5 of the Life Changes Trust's priorities - **"I am empowered to do the things that are important to me"** - it also touches on the other priorities and puts people with dementia and unpaid carers in a position where their voice is heard, undiluted.

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4 <https://www.lifechangestrust.org.uk/project/dementia-and-sensory-challenges>

5 <https://www.lifechangestrust.org.uk/peer-peer-resources-evidence-and-learning>

We know from feedback received that these resources are also being used by professionals to update training packages and demonstrate the real-life experience of dementia to students. They are far more memorable than some traditional approaches to training.



# Funding strategically at a local level

Given the enormity of the Dementia Programme's beneficiary groups, and the fact that most crucial policy and decision making is at the local level, the Trust embarked on an ambitious three-year programme of collaborative regional events. The purpose of this programme was twofold.

First, it was to gather information about the ongoing priorities of people living with dementia and unpaid carers of people with dementia at a local level. Second, this information could then be used for three strategic purposes: a) to sense-check the Trust's decisions regarding legacy funding which would operate at both national and local levels; b) to inform the development or amendment of Integration Joint Boards' local dementia strategies; c) to inform the next National Dementia Strategy produced by the Scottish Government.

**HOLD THE DATE:  
Human rights,  
community and  
dementia...  
let's keep the  
discussion going!**



**In 2018, the Life Changes Trust embarked on a series of collaborative learning events across Scotland called 'Community and Dementia: Creating Better Lives.'**

**These events will support local communities to uphold the human rights of people with dementia and unpaid carers.**

**Next online event:  
Greater Glasgow & Clyde  
31st August 2021  
10 - 12.30pm**

**Registration opens soon...**

Location	Date
Orkney	May 2019
Western Isles	September 2019
Inverness	Nov 2019
Aberdeen	March 2020
Forth Valley	May 2021
Greater Glasgow & Clyde	August 2021
Tayside	April 2021
Perth	May 2020
Fife	Feb 2021
Edinburgh & the Lothians	November 2020
Argyle & Arran	November 2019
Scottish Borders	22 July 2021
Lanarkshire	May 2021

The programme was broken down into fourteen individual initiatives to cover all fourteen health board areas in Scotland. The Trust's approach was to plan the events several months in advance by bringing together a collaborative local planning group. It was made clear that they would shape the event and it was their opportunity to demonstrate what is working well in each local area. This involved several planning meetings before a large-scale event was held in each health board area.

The planning included people with dementia, unpaid carers, Chief Officers, third sector agencies and a number of others. The Trust paid for the events, which ran over three days each time, while they were face to face events. In addition to this, several days were allocated to hear directly from people with dementia and unpaid carers through the medium of storytelling.



This highly effective way of giving people space to talk and reflect was led by the Village Storytelling Centre in Glasgow.<sup>6</sup> From the storytelling sessions, local priorities were identified and then fed back to the main conference event so that everyone present could reflect on them further and respond to what people with dementia and unpaid carers were saying was important to them.

Each event had an all-day conference and a number of social events that brought people with dementia and unpaid carers together from across the region. To read the conference reports and watch videos of these events, go to <https://www.lifechangestrust.org.uk/project/community-and-dementia-creating-better-lives-regional-events-and-grants>.

Following each local collaborative event, the Trust launched a small grants scheme that was focused on local initiatives. The purpose of the scheme was to provide funding for smaller organisations that provide a vital service but often miss out on bigger grants. Each health board area was provided with a Trust-funded learning co-ordinator who brings funded local organisations together to share learning and network. In most areas this had not been happening. The small grants scheme is being evaluated by Blake Stevenson and the report will be available in 2022.

One further outcome of these collaborative regional events was the development and publication of new local dementia strategies that were better informed by people with dementia and unpaid carers. This has been an important strategic step forward and it was rewarding for the Trust to see this happening relatively quickly after the Trust-funded events. These local dementia strategies include Aberdeenshire<sup>7</sup> and Orkney<sup>8</sup>.

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6 <https://www.villagestorytelling.org.uk/>

7 <http://publications.aberdeenshire.gov.uk/dataset/d39a62ee-f972-42ea-803e-a349ce8720f5/resource/e06d963c-9b71-4b55-8630-bff55e30cd18/download/making-connections-aberdeenshire-dementia-strategy-2021-to-2030-accessible-version.pdf>

8 [https://www.orkney.gov.uk/Files/Committees-and-Agendas/IJB/IJB2020/IJB24-06-2020/I08\\_Dementia\\_Strategy.pdf](https://www.orkney.gov.uk/Files/Committees-and-Agendas/IJB/IJB2020/IJB24-06-2020/I08_Dementia_Strategy.pdf)

When the COVID pandemic struck, the entire collaborative regional events programme had to be moved online. This was an enormous challenge. Fortunately, the Trust had already been working with HCVF Film and Events, based in Inverness, to live stream the events via Facebook. They were able to support with the transition to a fully online approach to the events programme.

By taking a highly strategic approach to these local events, and working in a collaborative way, the three-year programme drew thousands more people into the work of the Life Changes Trust and the new infrastructure and approach it has developed, and this will be passed on to legacy partners.

The Trust's Young People with Care Experience Programme also recognised a lack of agency for young people to have a say in how and where services were delivered locally, and what they felt would benefit them the most. There was a distinct lacking when it came to listening to these voices, and involving young people in developing strategies and practices in the areas where they lived. For that reason, the Trust funded Champions Boards.

Champions Boards are forums created to provide young people with care experience with a space where they can meet, and work with key decision makers involved in the design and delivery of local care services. The Trust has funded 21 Champions Boards across Scotland and there are also a number of areas with Boards which do not receive Trust funds. They are based primarily within Local Authorities and provide a platform for young people to have a deeper engagement in influencing local policy and practice.

The vast majority of these Boards have made arrangements and put plans in place to continue after the closure of the Life Changes Trust, and they have also formed their own network to identify issues that are not just local, but national.

# Funding strategic developments nationally

The Trust has always recognised the role played by wider system factors in preventing young people with care experience to achieve their full potential. In the early days of the Trust, we were troubled by the deficit language which was often attached to children and young people who need formal care. We felt it was important to emphasise that children and young people with care experience are all individuals with their own unique talents and skills. There is no doubt that, as a population group, they do face barriers in terms of health, education, poverty and isolation. However, a narrative around care that constantly emphasises these and other challenges can get in the way of young people forming a strong, confident identity and finding their own place in the world.

The reality is that many young people with care experience face negative attitudes which can colour the way they think of themselves, sometimes with lifelong consequences.

We know this because people with care experience of all ages speak consistently about it, but as a sector we didn't necessarily understand where this negativity came from or what we could do about it.

Therefore, when the Trust was given the opportunity in 2016 by The Robertson Trust to invest in research with the FrameWorks Institute we recognised its strategic value.

This research would not only offer us a depth of understanding regarding public attitudes, it would also offer tools to help all of us communicate about care and care experience in a way that counteracts unhelpful thinking (known as “reframing”). From the outset, this work was supported by a collaborative group of funders and informed by a cross-section of advisors, including those with lived experience.

As the work progressed, the Independent Care Review and subsequently The Promise set out a vision for care in Scotland which highlighted a key role for everyone in society to nurture children, young people and families. This provided a timely strategic context for the reframing work and the partners moved to put research into practice by creating the Each and Every Child initiative. The initiative is supported by a Voices of Experience Group and is growing a community of allies across Scotland who are determined to tell a fresh story about the care system and the children and young people in that system.

The Trust made a longer-term commitment to this work (over 5 years) in recognition of its strategic importance. This meant we had to be patient and not expect instant results. A key element of strategic funding is letting go and allowing space for relationships and collaborations to develop. There can be bumps in the road – but having a clear vision of what is possible helps to bring people together and keep things on track.

# Ensuring the strategy can flex but stay on course

To read more fully about what the Trust considers to be ‘flexible funding’ see the ‘Being A Flexible Funder’ booklet as part of this series of publications.

Given the topic of this booklet, it is important to note that being a highly strategic funder does not preclude being flexible; in fact, being flexible enhances the strategy. Establishing the Trust’s five key priority areas, in line with what beneficiaries were telling the Trust, provided five fairly broad areas within which to flex. They gave funding staff a strong sense of what Trustees likely would and would not want to fund and they could advise along those lines.

It soon became apparent that anything that fell outside the parameters of the priority areas usually had not been developed with beneficiaries. The questions the Trust asked about the involvement of people living with dementia, unpaid carers and young people with care experience were in-depth and did not allow applicants to take a “tick-box” approach. We looked for evidence of meaningful involvement, underpinned by relationships and respect and we expected this involvement to be ongoing.

The priority areas were not rigid. Applications might span more than one priority area, and sometimes a funding call was focused specifically on one area. For example, the Young People with Care Experience Programme’s ‘Home and Belonging’ funding and the Dementia Programme’s ‘Dementia Home Enablement’ scheme both focused on Priority 1 - **“I live in a place that suits me and my needs”**.

Trust staff put significant effort into building relationships with funded projects. We recognised that if we wanted projects to be open about what was challenging as well as what was working well, trust would be vital. There were clear benefits to this approach. For example, a number of funded initiatives asked to adjust their project plans after analysing their first few rounds of feedback and evaluation. They realised they could be more effective if they adopted a different approach, or built on an idea that had emerged from the initial work. Clearly a grant holder could not change their work entirely, but if it still sat within the Trust's strategic priorities and was going to bring greater benefit to beneficiaries then it would be approved.

COVID brought considerable challenges for organisations funded by the Trust and, like all other funders, the Trust had to consider ways to help initiatives adapt and flex to meet need in different ways.

COVID highlighted the strength of relationships between the Trust and its awardees as the phones began to ring and emails flood in from organisations looking to discuss how they would flex their work to help beneficiaries during a very difficult time. The speed and confidence with which they approached the Trust signalled that they were comfortable that their requests would be understood and accommodated as far as possible.

COVID also brought a challenge to the Trust itself. As a life-limited Trust with an ever-diminishing endowment, there were no extra resources to provide additional funding beyond what was already planned. There was obviously some contingency but not enough to make available the amount of money the Trust felt its beneficiaries might need. Most other funders had the option of looking to their long-term future when dealing with COVID. The Trust did not.

After much discussion between the Trust’s Strategic Leadership Team and the Board, two decisions were made. The Trust would close its physical office permanently and the Trust would close its public facing operations in March 2022 instead of March 2023. This provided the Trust with more leeway to open up funds to support individual beneficiaries through the COVID pandemic and increase the amount of legacy funding available.

The pandemic also coincided with key policy developments for the Trust’s beneficiary groups: the launch of The Promise Scotland<sup>9</sup> following the findings of the Independent Care Review (young people); and the Independent Review of Adult Social Care in Scotland.<sup>10</sup> It seemed to be the right time to put final legacy arrangements in place to ensure a smooth handover to legacy partners who will continue the approach of the Trust beyond 2022.

A highly strategic approach can enable flexibility and also needs to be able to respond strategically to the unexpected – always to the advantage of beneficiaries.



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9 <https://thepromise.scot/>

10 <https://www.gov.scot/groups/independent-review-of-adult-social-care/>

# Evaluation - have we done what we said we would?

Someone once commented that the Life Changes Trust evaluates everything that moves. Although not entirely the truth, evaluation has played an important role in the strategy of the Trust. How can we know that something has worked if we don't evaluate it? And how do we discover what does not work so well? The Trust has a commitment to continuous learning and the development of a strong evidence base for its beneficiaries.

Several grant holders groaned when we were insistent about self-evaluation from 'Day 1', followed by participation in an independent evaluation commissioned by the Trust. Self-evaluation reports formed part of the Trust's monitoring and reporting requirements. The reason for this was that they had experience of providing funders with well-written, helpful evaluation reports which were often filed away never to see the light of day again.

After some honest conversations, provision of evaluation support, and even visits to some organisations, the value of evaluation began to emerge. Organisations found they had useful information at their fingertips when making funding applications to other funders. They were able to recall evidence that would otherwise have been forgotten.

The Trust insisted that beneficiaries were involved in collecting evaluation data where they could, and that creative methods were employed rather than saying "it is just too difficult". For people with dementia, it was very important to capture 'in the moment' feedback. With young people, the possibility of providing thoughts and reflections at any time and through a number of routes (not just written form) is extremely helpful.

As well as collecting self-evaluation data, the Trust appointed a wide range of independent evaluators to meet with clusters of initiatives over a period of time and determine their approach and the outcomes of their work. Independent evaluators were generally pleased to see that there was already data available for them to analyse.

The recruitment of suitable evaluators proved to be challenging. Many relied on their reputation to bid for work and made little effort to find out about the Life Changes Trust and what its approach was.

Others could not comprehend how beneficiaries could be involved in evaluation work. However, we have worked with some incredible evaluators over the past five years and most of them would say that the requirements of the Life Changes Trust have caused them to pause and reconsider some aspects of their own approach to evaluation.

Once evaluation reports were published these were not filed away but have formed the basis for many learning events to reflect on their findings and determine the next steps to take. Due to COVID these events have all been online and will continue to be so. One advantage of this is that we have a media record of the findings and discussions, as well as the evaluation reports, which will be accessible for years to come. These recordings and evaluation reports are available here:

**Young People with Care Experience Programme:** <https://www.lifechangestrust.org.uk/young-people-care-experience>

**Dementia Programme:** <https://www.lifechangestrust.org.uk/our-dementia-programme>

The Trust's Evidence and Influencing staff use this evidence to influence key policy makers and practitioners regarding what a good approach to service provision looks like in practice. Much of the Trust's evidence is ground-breaking and looks at areas never previously evaluated in Scotland. In this way, it is highly strategic and provides solid evidence of what works in relation to the Trust's five key priorities for beneficiaries.

This influencing role will be handed on to the Trust's strategic legacy partners when the Trust closes its doors in March 2022. It is our hope that this evidence will influence policy and practice in Scotland far beyond the lifetime of the Trust.

As well as learning from work funded by the Trust, the Life Changes Trust Board commissioned an overarching evaluation of the Trust itself – its strategy, priorities and approach. There was no formal requirement for this evaluation, but Trustees felt it would be helpful to others considering a similar approach in future years. Trustees were also very keen that young people with care experience, people with dementia and unpaid carers were involved as paid co-researchers, which has been the case.

The overarching evaluation has been conducted by the University of Stirling and Ipsos MORI, with a report being published early 2022. This evaluation will also draw on the findings of Trust-commissioned independent evaluations of funded work. There will be an opportunity to attend a learning event based on the findings of the report.

# The wider benefits of highly strategic funding

From the outset, the Life Changes Trust was on a course to closure. As a life-limited Trust with a spend-out endowment, there was always an eye to the end of the Trust and what it would leave behind as a legacy. The Trust aimed to work in partnership with those who would rally to its aims, priorities and values, and make sure that they knew the Trust would not be around forever.

Since its inception, the Trust has developed relationships with hundreds of organisations across Scotland. These are not just funding relationships but also learning and influencing relationships. This is demonstrated by the fact that the relationships have continued after funding awards have come to an end. In some cases the relationship has not involved funding at all. It was vital that potential Awardees understood the Trust's strategic purpose from the beginning. Many quickly understood the Trust's approach; others were initially apprehensive but found out more and understood the benefits the approach could bring. Some simply started out with a desire to do something good for the Trust's beneficiaries and found themselves involved in something far bigger and more strategic.

The Trust has developed many partnerships. Some of these were with other funders who have added financial value by offering match funding for particular initiatives. Most of the Trust's large investments required a match funding element in order to ensure the initiatives were not solely reliant on Trust funding. Match funding to the tune of £15,497,680 has come from a variety of sources - the funding sector, third sector, statutory sector and individuals.

This has added around 32% to the overall value of the Trust's original endowment.

These ongoing relationships have meant that there is a deep pool of potential legacy partners to draw upon who will carry the Trust's aims, priorities and values beyond the lifetime of the Trust. This will not look identical to what the Trust has done, but will build upon the Trust's work for years to come. It is more important that the work lasts than that the name of the Life Changes Trust is remembered.

## Top Ten Tips

- ▶ Make sure the Board and staff have a shared understanding in respect of the strategy and revisit this regularly.
- ▶ Build the strategy around what beneficiaries say is important to them and keep the dialogue going.
- ▶ Have a long-term vision that paints a picture of what you wish to achieve and fund against that strategy. Commit to longer-term funding relationships and explore collaborations with other funders where appropriate
- ▶ Recruit staff who are genuinely committed to your cause – as demonstrated through the application and interview process.
- ▶ Recruit Programme Directors who understand the context the programme operates in and who are willing to learn more.
- ▶ Be driven by the needs of beneficiaries first and prioritise relationships with them, while being aware of other agendas that complement your own.
- ▶ Consider funding at an individual or local level as it can be highly strategic.
- ▶ Evaluate, evaluate, evaluate, and use the evidence for shared learning and influencing activities.
- ▶ Allow the strategy to be flexible where necessary, with advantage to beneficiaries the primary consideration.
- ▶ From the outset, think ahead to leaving a legacy of strong relationships, influence and funding that others can build upon, creating something even greater in time.

