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# Foundations for knowledge

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Matthew van Poortvliet  
Lucy de Las Casas  
Padraic Brick

**Sharing knowledge to increase impact:  
a guide for charitable funders**



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# Executive Summary

Think back to a grants programme that you have run. What did you need to know to make it a success? What did you learn from it? Who else benefited from the knowledge you developed?

Knowledge is essential to charitable funders. It helps them to understand social issues and how to tackle them, which initiatives to support, and how to fund effectively. By learning from their own work and that of peers, funders can make better decisions; by sharing what they know, they can create wider influence—ensuring that the best approaches are adopted by government, other funders and charities.

Funders are uniquely placed to be repositories for knowledge and to share that knowledge with others. Their independence, resources and long-term approach enables them to build expertise and share messages in a way that others cannot. At a time when financial resources are stretched, it is vital that they make the most of their ‘intellectual assets’ to increase their impact.

## What is currently happening?

There is a feeling across the sector that at present learning and knowledge-sharing are not working as well as they might. Funders report that many initiatives occur in isolation, with not enough done to learn from others or share lessons. ‘Dissemination’ is sometimes an afterthought, and a culture of ‘good news stories’ means that valuable lessons about what doesn’t work are

rarely publicised. Across the sector as a whole, the infrastructure for sharing is underdeveloped and initiatives to improve it are fragmented and poorly resourced.

That said, many funders are putting considerable effort into learning and sharing what they know. There is also a mood for change in the sector. A growing openness towards sharing information, the rise of web-based technologies, and an awareness of knowledge as an untapped resource have led many funders to rethink traditional priorities and approaches. Increasingly, funders are viewing transparency not as a threat, but as an opportunity to create more impact and have more influence through being open about their work.

## What can funders do?

There is no single ‘right’ way for funders to learn and share knowledge. What funders do will vary depending upon their mission, values, and what they want to achieve, as well as how much they are able to invest. However, all funders have a responsibility to consider learning and knowledge-sharing in meeting their charitable objectives. As this report shows, there are many good examples in the UK and abroad from which funders can learn and develop their practice. At their best, funders are:

- **Learning through their grant-making** by gathering information from external sources, conducting research where there are gaps, and developing a culture of learning among their

staff. For example, funders are undertaking staff exchanges with peer organisations, using volunteer networks to gather local knowledge, and consulting their grantees.

- **Sharing their knowledge** with other funders, charities and policy-makers. For example, by targeting their knowledge through networks and membership organisations, sharing their failures, and developing tools for others to use. This is improving funding practice, informing policy and ensuring that efforts are not duplicated.

## Improving the infrastructure

The sector as a whole needs centralised resources to encourage and facilitate learning and sharing. The Association of Charitable Foundations (ACF) is well placed to develop this infrastructure and host resources. However, it requires additional support from the leading funders.

Supported by City Bridge Trust and other funders, ACF and NPC are running a simple pilot website to share knowledge between funders. It will contain funder-specific search tools, a Q&A space, and a forum for topical issues. We are convening a group of funders to be part of this pilot, and would like to invite you to participate—whether contributing resources, ideas or signing up to use the website. Please get in contact if you would like to be involved.



# Foreword from The City Bridge Trust

As a charitable funder, you are often seen in terms of the money that you give out. It is sometimes forgotten that we also have considerable 'intellectual assets' to draw on.

Through the process of making grants, we all develop expertise and specialist knowledge that is valuable to others—what you learn during a grants programme can be the difference between another initiative in that field succeeding or failing. Making the most of our collective experience and knowledge is vital, especially when financial resources are stretched.

At The City Bridge Trust we have undertaken a number of initiatives to share what we have learnt. We run events and disseminate lessons through publications such as *The Knowledge*. But we know we can do better and are keen to learn from what others are doing. We commissioned this research by New Philanthropy Capital to explore what funders in the UK and abroad are doing to share their knowledge and learn from others.

The case studies here provide inspiration and a wealth of examples for all types of funders. Whether it's setting up staff exchanges, using online resources, or even hiring investigative journalists, there are numerous ways of learning from your work and sharing your knowledge with others. The report provides a guide to help you think through your approach, and recommendations for what you can do. We encourage funders of all kinds—trusts and foundations, government funders, corporates or individual donors—to use it and learn from the examples.

NPC's research also revealed an interest from funders in a centralised online resource to improve learning and knowledge-sharing in the sector. With our support, and that of other funders, ACF and NPC are soon to run a simple pilot website. It will contain funder-specific search tools, a Q&A space, and a forum for topical issues. The aim is to get funders sharing more regularly, and encourage a freer exchange of expertise. We are convening a group of funders to be part of this pilot, and would like to invite you to participate—whether contributing resources, ideas or signing up to use the website.

You may think that knowledge-sharing is not for you, or that you are doing it already. But, however large or small you are, whatever your priorities, we could all be doing more. We urge you to read this report and contribute to how we can make the most of what we know.



Clare Thomas MBE  
Chief Grants Officer



# Introduction

## Why invest in learning and sharing knowledge?

Knowledge is an asset that should enhance funders' financial resources. Learning helps funders to make better decisions. Sharing knowledge ensures that the best approaches are adopted, efforts are not duplicated, and mistakes are not repeated. By using knowledge strategically, funders can effect wider change than they can through their grant-making alone—for example, by influencing policy-makers or other funders.

Although the extent to which funders invest in this area will depend on their individual priorities and resources, learning is not an 'optional extra'. Failing to invest in learning and sharing knowledge will mean that grants are wasted and beneficiaries lose out.

Just as a funder must make sure it is up to date with legal developments relating to charity governance and grant-making, it should also feel obliged to stay on top of developments in the fields in which it funds to ensure it is delivering public benefit through its grant-making. As the Charity Commission identifies, a commitment to learning is a hallmark of effectiveness.\*

## Charitable funders are uniquely placed to learn and share knowledge

Funders are well placed to be repositories for knowledge in a field of expertise, and to share that knowledge with others. They are able to build expertise, share messages and pursue goals over a **long time period**. Their staff have often been in post longer than grantee staff and have knowledge of other organisations in their field. They also **span boundaries** and can convene groups that would otherwise be unconnected, which can make them an 'honest broker', encouraging reflection among different organisations.

Charitable funders are also **independent**, so they can learn, reflect and share knowledge without political or commercial interests. This gives them credibility and a unique voice. Some funders have **resources** unavailable to many grantees (including money, staff, infrastructure, communications functions, contacts, venues and so on) and **influence** (for example, with policy-makers) because of their profile and reputation. Box 1 illustrates how a funder can use what it knows and its unique position to make an impact.

### Box 1: The unique position of funders<sup>i</sup>

In 2000, the needs of young care leavers were often unknown and ignored. Through making grants in this area, the Frank Buttle Trust was aware of these needs, and from 2001, it commissioned research to provide systematic evidence. The Trust was not a traditional campaigner, but by creating a new body of knowledge and sharing it with the right audiences it was able to raise awareness, change policy and improve services.

The Trust was in a strong position to achieve this because of its:

- **First-hand knowledge:** it had become aware of the needs of care leavers as a result of its knowledge derived from grant applications.
- **Ability to make connections:** the Chief Executive, Gerri McAndrew, had a background in social services and knew the field well. She said that the Trust *'added value by bringing in agencies who wouldn't normally think about this.'* One civil servant said: *'The Trust used its position to make appropriate connections. Civil servants can't do that so easily.'*
- **Long-term approach:** *'It was powerful that this was a five-year research project. The DfES couldn't have done an in-depth five-year study of such a particular group—there would always have been competing priorities.'* (McAndrew)
- **Resources:** Over six years, the total cost of the project was £680,000. However, the Trust was able to draw in funding from many other sources for the research and dissemination, so that its grant-making to individuals in need was not reduced.
- **Independence:** *'It was important that we, as a Trust, had no party-political alignment, and we very carefully didn't seek any. And we had no axe to grind in terms of other rivalries.'* (McAndrew)

By 2007, a government White Paper had incorporated the Trust's recommendations and a Quality Mark has since been introduced. This has improved the level of support for young care leavers.

\* The Charity Commission's report, *The Hallmarks of an Effective Charity*, identifies six criteria of effectiveness, one of which is a commitment to 'learning and improving': *'An effective charity is always seeking to improve its performance and efficiency and to learn new and better ways of delivering its purposes.'*

Sharing knowledge ensures that the best approaches are adopted, efforts are not duplicated, and mistakes are not repeated.

### Why should funders think about this now?

Many funders in the UK are currently reflecting on the role of learning and knowledge-sharing within their organisations. A growing openness towards sharing information, the rise of web-based technologies, and an awareness of knowledge as an untapped resource have led many funders to rethink traditional priorities and approaches.

At a time when financial resources are stretched, funders should be asking themselves how they can create maximum benefit, and what other resources they may have at their disposal. The current pressure on funders to direct resources to the frontline and reduce costs may make this more difficult. But funders should seek to understand the costs and benefits involved in learning and knowledge-sharing, and their purpose for doing it, in order to make the case for its development to trustees.

There is also a broader social and political shift towards making information available. Governments are opening up data sources through portals such as data.gov.uk, partly driven by a desire for greater accountability, but also through an awareness that information can be used in innovative ways when it is made widely available for reuse. Increasingly funders are viewing transparency not as a threat, but as an opportunity to create more impact and have more influence through being open about their work.

### The challenge: learning and knowledge in the voluntary sector

Most research on organisational learning and knowledge has been within the context of commercial organisations.<sup>ii</sup> However, over the last twenty years there has been a growing literature on foundation learning, knowledge management and communications. This identifies barriers to learning and knowledge-sharing in the voluntary sector, including:

- An 'activist' culture in the sector, which can view learning as a luxury.
- Weak incentives for learning and sharing knowledge.

- 'A shared culture of diffidence among funders', which discourages openness about their activities and agendas.<sup>iii</sup>
- Underdeveloped and under-resourced systems for collecting and documenting learning.
- Pressure from stakeholders on organisations to provide 'good news stories' rather than to analyse or critique their own work rigorously.<sup>iv</sup>
- Poorly articulated 'demand' — charities and funders do not know who needs or wants the knowledge that they have amassed.

Many funders and commentators argue that learning and knowledge-sharing are underdeveloped in the voluntary sector. Indeed, one report highlights that '*many people within the philanthropy sector do not appear to have applied to their work in a systematic way knowledge that has been gained by their peers or through research.*'<sup>v</sup> In this report, we will explore current practice, what can be learnt from it, where the gaps and challenges lie, and how funders can think through the options for what they can do.

### About this report

This report aims to identify what can be learnt from funders' experiences and literature on learning and knowledge-sharing, and help funders to think through how they should approach this subject.

It is intended for funders who may not previously have thought about what they know and how it could be used. For these funders, we hope that the guide in Section 1 will provide a framework for thinking about knowledge and Section 2 will provide some ideas for how to go about it.

It is also aimed at funders that have been grappling with these questions for some time. For these funders, it may provide ideas for refining and improving their approach to make their knowledge-sharing more effective. We hope Section 3 will also provide challenge and ideas for how these funders could improve resources within the sector.

For both audiences, we hope that it will provide inspiration both to inform their own approaches, and to share their approaches with others.

## Contents

1. The first chapter presents **a guide** to help funders develop a strategy for learning and knowledge-sharing. It also provides **recommendations for funders**.
2. The second chapter provides examples of **current activities** undertaken by funders in learning and knowledge-sharing. It also summarises the costs and benefits.
3. The third chapter looks at the **sector infrastructure** aimed at facilitating learning and knowledge-sharing, and provides **recommendations for the sector** for improving it.

## What do we mean by knowledge?

There is no one definition of 'knowledge'. There is a broad philosophical and sociological literature looking at knowledge in the abstract, and as it applies to organisations, both of which reveal it to be a contested concept. Here, we define it broadly as the expertise, skills and information that funders draw on to do their jobs, or generate through their work. Learning is the process by which knowledge is acquired and developed.

Knowledge can be **explicit**, which is codified and can be shared in written form. Or it can be **tacit**, which is highly personal and hard to formalise, such as intuitions, experience and hunches. Whereas explicit knowledge is often held in reports and databases, tacit knowledge generally resides in the minds of individuals and teams, and is extracted by interaction.

Knowledge is **contested**: it is not objective truth. The development of knowledge usually relies on assumptions that other parties may not share and this means that knowledge can be subject to challenge.

## Methods

NPC started this research in March 2010. We conducted a review of UK and US literature on learning and knowledge-sharing, and web-based research on what different organisations were doing. We then conducted semi-structured interviews with 12 UK foundations, gathered case studies and data on costs, and spoke to other commentators in the sector. An advisory group of six funders has provided advice and feedback during this research. Full references are provided at the back of this report.

We are very grateful to the individuals we interviewed for their input, and to the advisory group who provided valuable feedback after taking the time and care to read consultative drafts of this report. We acknowledge that there are many funders doing interesting and valuable work in this field that we have not been able to speak to or feature in this report.



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# How should funders approach learning and knowledge-sharing?

Learning and knowledge-sharing require investment, whether of existing staff time or new resources. Therefore funders must weigh up the benefits and the costs before deciding whether to undertake them. Logically, there are several benefits:

- By learning from their own work and that of others (eg, their grantees), funders can make better decisions.
- By sharing what they know with others, funders can ensure that the best approaches are adopted, efforts are not duplicated, and mistakes are not repeated.
- By using knowledge strategically, funders can effect wider change (eg, a change to policy or practice, or leveraging funding).
- By developing their own knowledge and sharing with others, the staff within funders gain more expertise in their fields and can broaden their portfolio of activities beyond grant administration. This can improve staff satisfaction and retention.

Set against the benefits, learning and knowledge-sharing activities have costs, including staff time and money. So it is relevant to ask whether these activities are a proper use of a funder's resources. What is the 'opportunity cost' of learning and knowledge-sharing? What impact can a funder have through investing in learning and knowledge-sharing versus spending the same money in its direct grant-making?

## What does learning and knowledge-sharing involve?

There are many different activities that funders undertake in order to obtain and share knowledge. Section 2 describes the range of

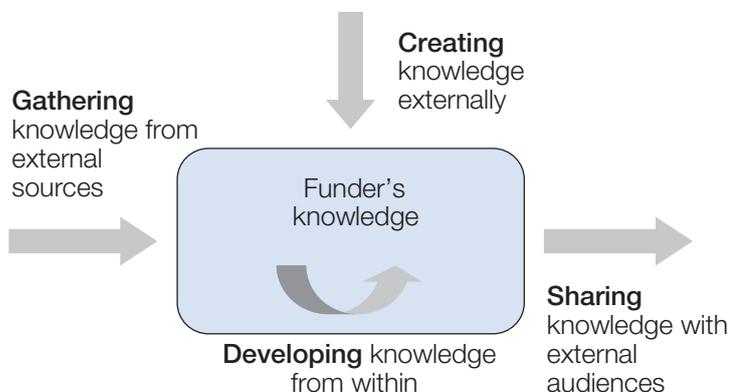
different options in detail. Here, it is useful to think of these activities as falling into four broad categories:

- |          |   |  |
|----------|---|--|
| Learning | { | A. <b>'Gathering'</b> knowledge from existing external sources (eg, reading existing reports, talking to experts, attending conferences and events).         |
|          |   | B. <b>'Creating'</b> knowledge where it does not already exist (eg, commissioning new research or external evaluations, convening grantees).                 |
|          |   | C. <b>'Developing'</b> knowledge internally from within the organisation (eg, staff learning sessions, internal evaluations, internal newsletters).          |
| Sharing  | { | D. <b>'Sharing'</b> knowledge externally (eg, with other funders, policy-makers, charities, the public, and academics) through reports, events or a website. |

By using knowledge strategically, funders can create wider change.

Figure 1 below illustrates these four ways of obtaining and sharing knowledge. The first three are ways that funders go about acquiring knowledge that they need, and the fourth ('knowledge-sharing') is about disseminating what they know.

Figure 1: A model for learning and knowledge-sharing



Funders should ask themselves how they can share knowledge to advance their aims and benefit others.

This model illustrates that there are both ‘supply’ and ‘demand’ sides for knowledge. To the left of the diagram is the demand: a funder ‘pulling in’ existing knowledge that it needs; to the right is the supply: a funder sharing what it knows. Recognising the ‘two-sided’ nature of transferring knowledge is important, because effectively sharing knowledge depends on understanding the needs and demands of your audience, and thinking through how other people learn.

**What should I do?**

There is no single ‘right’ way for funders to learn and share knowledge. What funders do will vary depending upon their mission, values, and what they want to achieve, as well as how much they are able to invest. Given the diversity of funders in the UK—ranging from those with dozens of staff to individual philanthropists—it is impossible to prescribe any particular approach.

However, there are a number of questions that funders can think through to help them determine what approach they should take.

- A. What are my aims, approach and resources, and how do learning and knowledge-sharing fit with them?
- B. What knowledge do I need and how can I obtain it?
- C. How can I create a culture of learning? What knowledge do I have, and who else might find it useful?
- D. How can I effectively share knowledge to advance my aims and benefit others?

As Figure 2 shows, these questions relate back to the types of activities outlined in the model above. Whilst such questions may seem obvious, many funders do not prioritise learning and sharing knowledge, and so are not routinely thinking through these basic steps. For example, some funders embark on grants programmes without gathering information on what other funders are doing in the same field, whilst others do not spend time assessing what they have learnt from a programme, who it might be valuable to and how it could be shared.

The sections below will help funders to think through these questions, raising some of the challenges involved and presenting some of the options.

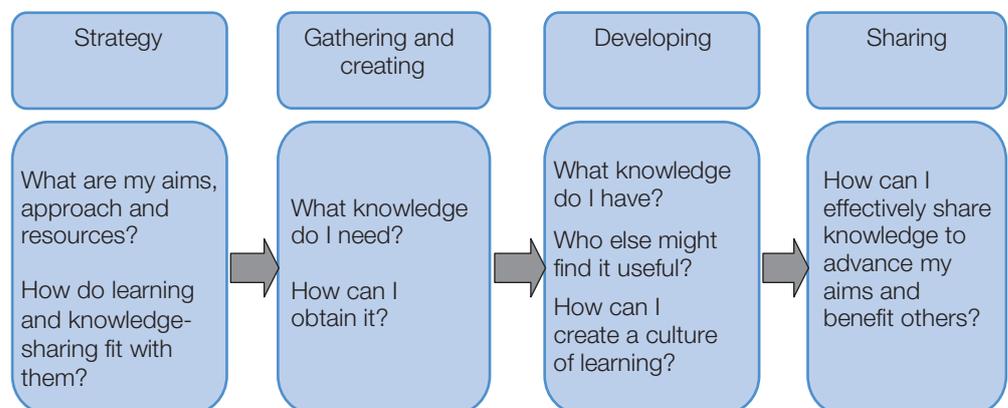
**A. Developing a strategy**

Funders are highly individualistic. They differ in what they aim to achieve, the approach they take and the resources at their disposal. All of these factors will influence their attitude towards how they acquire and share knowledge.

**What are my aims?**

Funders need to be clear about what they want to achieve, and what their own purposes are for learning and sharing. As discussed in the introduction, funders are in a unique position to learn, share and influence others. However, without a clear purpose, there is a danger that their freedom and resources may not be used effectively—that roundtables and reports become more about intellectual interest than achieving social change. As one funder says of learning and knowledge-sharing, ‘We continually need to ask ourselves what we are doing for purpose, and what we are doing for prestige’.

**Figure 2: Thinking through your approach**



When developing a learning and knowledge-sharing strategy, funders must think through how activities fit with their aims. For some, knowledge will be **instrumental**: a funder interested in changing policy may invest significantly in gathering and generating information and using this to inform and influence. For others, knowledge will be a secondary aspect, or **by-product**, of their work: a funder supporting a group of vulnerable people will want the majority of its funds to reach the frontline, so is likely to commit fewer resources to learning and sharing. However, it may nonetheless generate knowledge through its grants programme, which it can subsequently share with others to create influence and improve practice.

### What is my approach?

The aims of a funder are likely to relate to the approach that it will take, and this too has a bearing on the type of knowledge that funders are likely to develop and the uses that they will put it to. For example, some commentators distinguish between ‘responsive’ and ‘interventionist’ funders,<sup>vi</sup> which are likely to see investing in knowledge in different ways.

- **Responsive funders** are interested in supporting the best proposals that are presented to them. Through their application process, they will develop an understanding of the various funding needs within the issue area that they have set out, and the types of organisations working in that area. Here, knowledge is likely to be a by-product of what they do.
- **Interventionist funders** wish to have an impact on a particular issue or area, frequently with a plan of intent. They are likely to require more up-front information for their work in order to develop a strategy and identify grantees. They are also likely to be more inclined to generate explicit knowledge (for example, a report) and proactively share it as a way of increasing impact. They are likely to see knowledge as more instrumental.

This is not a strict distinction and often individual funders will have strands of both responsive and interventionist funding. Another broad distinction is between ‘specialist’ funders, focused on a small number of defined programmes, or ‘generalist’ funders, covering

a range of broad issue areas. Again, this will influence the type of knowledge gathered, and the potential audiences with which it can usefully be shared.

- **Specialist funders** will develop in-depth knowledge in particular areas. They might focus on a need or issue such as homelessness or climate change; on a geography for regional funders; or on organisational issues, for those focusing on capacity building or scaling up. The knowledge they are likely to develop will be detailed and focused, and the audience for sharing it should be well defined.
- **Generalist funders** will develop a much broader view across a range of different issues, geographies and practices. Through this, they may be able to identify trends across different issues, and make connections invisible to specialist funders. But because of their range, the question of how to engage with knowledge is often a more difficult one.

### How do my resources affect what I should do?

Funders with limited resources are less likely to see learning and knowledge-sharing as priorities. However, at a minimum, they should be gathering information to understand what is going on in the areas that they fund. As niche funders in an issue or region, they may also have specialist knowledge that will be useful to funders with much greater resources, and this can be a way of leveraging their own funding and creating wider influence (Cripplegate Foundation in North London and the Francis C Scott Charitable Trust in Cumbria are examples of funders that are doing this successfully—see Section 2).

Larger funders are more able to make resources available to invest in learning and knowledge-sharing. By virtue of the volume of funding they distribute, they are also likely to generate more knowledge than smaller funders, so there is greater responsibility on them to share it. In addition, they are likely to have more complex organisational structures so will need to invest in learning and development to ensure knowledge is being shared internally.

“We continually need to ask ourselves what we are doing for purpose, and what we are doing for prestige.”

Funders with limited resources can create wider influence by using their specialist knowledge.

Networking usually occurs between senior staff. It can be difficult for grants officers to find opportunities to learn from each other.

## B. What knowledge do I need and how can I obtain it?

Successful funding is rooted in the application of learning. Funders need different types of knowledge in order to develop funding programmes, set strategic priorities and select grantees. They need knowledge in the areas in which they fund, knowledge of organisations, of grant-making processes, endowment management, measuring impact and numerous other areas.

Funders can gain knowledge in these areas from experience (their own and that of peers), from research, teaching, past lessons and current practice.<sup>vii</sup> The quality of everything that funders do is influenced by the knowledge that they build and the rigorous application of learning.

This may seem obvious, but basic learning to inform grant-making is not working as well as it might. It has been argued that at present funders (and their board members) are not paying enough attention to acquiring knowledge that would help them do their jobs better. One report argues that *'many people within the philanthropy sector do not appear to have applied to their work in a systematic way knowledge that has been gained by their peers or through research.'*<sup>viii</sup> Box 2 lists some of the questions that funders should routinely be asking themselves.

### Gathering knowledge from existing sources

There are two typical scenarios in which foundations need to gather knowledge. First, in a one-off review: for example, to inform a strategic review or development of a new programme. Second, to stay up to date with a topic, such as new research on grant-making or the focus of a grant-making programme. Section 2A lists a wide range of ways in which funders can do both.

One challenging aspect of learning is through the experience or 'tacit knowledge' of other funders. This is a very valuable source of information and much relies on the informal relationships formed between different funders. In the UK, there are relatively established networks of the main grant-makers who effectively share knowledge through events, forums and meetings. However, this can be inaccessible to some organisations, particularly smaller, newer or regional funders.

Even among well connected funders, it tends to be CEOs and senior figures who meet or go to conferences, so it can be difficult for grants officers to find opportunities to learn from each other (staff exchanges described in Section 2A may be one way around this). The advice given by one regional funder is that, whatever your resources, the most important lesson for learning and sharing knowledge is simply to *'network like crazy'*.

### Filling the gaps

Where information does not already exist, funders may need to invest in creating knowledge, through research, convening grantees or experts, or commissioning external evaluations. This is sometimes perceived as expensive so is usually undertaken by funders with more resources. However, it can have a significant impact if the findings are valuable and they are targeted at the right audiences (see Section 2B for examples).

Nor does it have to be expensive. Whilst commissioning new research is likely to involve a significant investment in time and money, convening a group of experts, charities or practitioners can often lead to valuable new insights for low cost.

#### Box 2: What do you need to know?<sup>ix</sup>

A consultation for David Carrington's 2009 report, *The application of learning and research to the practice of philanthropy*, suggests that *'there is a deficiency of knowledge within the philanthropic sector about sources of knowledge or evidence that could help practitioners better to understand the arenas within which they have chosen to operate.'* The report highlights a number of fundamental questions that funders should be asking themselves about the quality of learning within their organisation:

- Do we know enough to do a good job?
- Do we know if we are doing a good job?
- Are we learning from our experience and from the experience and evidence of others?
- Are we applying that learning to our current and future work?

## C. What knowledge do I have and who might find it useful?

### What knowledge do I have?

Through developing funding programmes and the practice of making grants, funders collect information and develop knowledge in a wide range of areas. Funders develop knowledge of **‘sectors’ or ‘topics’**: needs and issues in specific areas, sector structure, individual organisations, government services and policy, contacts, interventions and trends. Funders also develop knowledge about **‘funding’**: grant assessment, managing relationships with applicants or grantees, grant-making practice, contacts among the grant-making community and monitoring and evaluation.

Some of this is **explicit** knowledge that might be found in published reports and evaluations, or internal documents. Some of it is **tacit** knowledge that lies in the heads of grants officers and other staff. Tacit knowledge is harder to extract and share but is often more valuable at a practitioner level because it contains the detailed insights and experiences of individuals.\* Conversely, explicit knowledge is often required for campaigning and policy work, because there is a perception that tacit knowledge is ‘anecdotal’ or ‘soft’. Table 1 shows some examples of the types of explicit and tacit knowledge that funders have, highlighting those that are routinely published at present.

### The challenge of sharing tacit knowledge

The form that knowledge is in will influence the approach to sharing it. In general, explicit knowledge will be codified in reports or databases, and will be relatively easy to share. Tacit knowledge usually lies in the heads of staff and is shared through human interaction. It therefore requires networking and bringing people together, or extraction approaches to try to codify it.

Extracting tacit knowledge from staff is not straightforward. Funders can have deep and diverse knowledge, built over many years of experience. However, funders find distilling and capturing this challenging, and although foundation staff know a great deal about their fields, this knowledge is often not made available externally.<sup>xii</sup> There is a learning process that needs to be developed within funders to turn tacit knowledge into action, and into a form that can be shared with other audiences.

Tacit knowledge is often the opinions and perceptions of individuals, which may be sensitive, and organisations would be uncomfortable formalising and publishing this externally. However, regular learning sessions and other extraction techniques should help to identify useful information (see Section 2, Part C). Networks and forums, such as Association of Charitable Foundations’ (ACF) Issue Based Networks and Professional Development Programmes are also a useful way of extracting and sharing tacit knowledge in ‘safe spaces’ (see Section 2).

### What to share?

Funders should ask themselves whether something is worth sharing and the extent to which they should invest in extraction and formal dissemination if they are uncertain of the demand for what they have. This may sound obvious, however, NPC found examples of some funders that decided to invest significant resources in dissemination but with no clear audience or purpose in mind.

Finally, funders need to work out specifically who might find their knowledge useful. This is not easy because demand is often poorly articulated, so funders do not know who needs or wants the knowledge that they have amassed. This may involve conducting market research on what users need, testing demand through umbrella bodies, or signalling expertise to other audiences.

Foundation staff know a great deal about their fields, but this knowledge is often not made available externally.

Table 1: Examples of explicit and tacit knowledge within funders<sup>xii</sup>

Explicit knowledge	Tacit knowledge
<ul style="list-style-type: none"> <li>Grant applications that provide information on issue areas</li> <li>Grantee progress reports</li> <li>Map of issue areas</li> <li>Research reports gathered from outside sources</li> <li><b>Programme evaluations</b></li> <li><b>Foundation-funded research</b></li> <li>Consultant reports</li> <li><b>Annual reports from funders and grantees</b></li> <li><b>Published articles by funder staff</b></li> </ul>	<ul style="list-style-type: none"> <li>How to ‘read between the lines’ in a grant proposal narrative</li> <li>Strategies for encouraging grantees to share failures as well as successes</li> <li>How to nurture collaboration between other organisations</li> <li>A programme officer’s accumulated knowledge of the history of efforts and organisations in the fields</li> <li>Vision of a field and the ability to assess synergies and gaps in programmes across many organisations</li> </ul>

\* Sources in bold are those that are routinely published at present.

Figure 3: Working out what to share

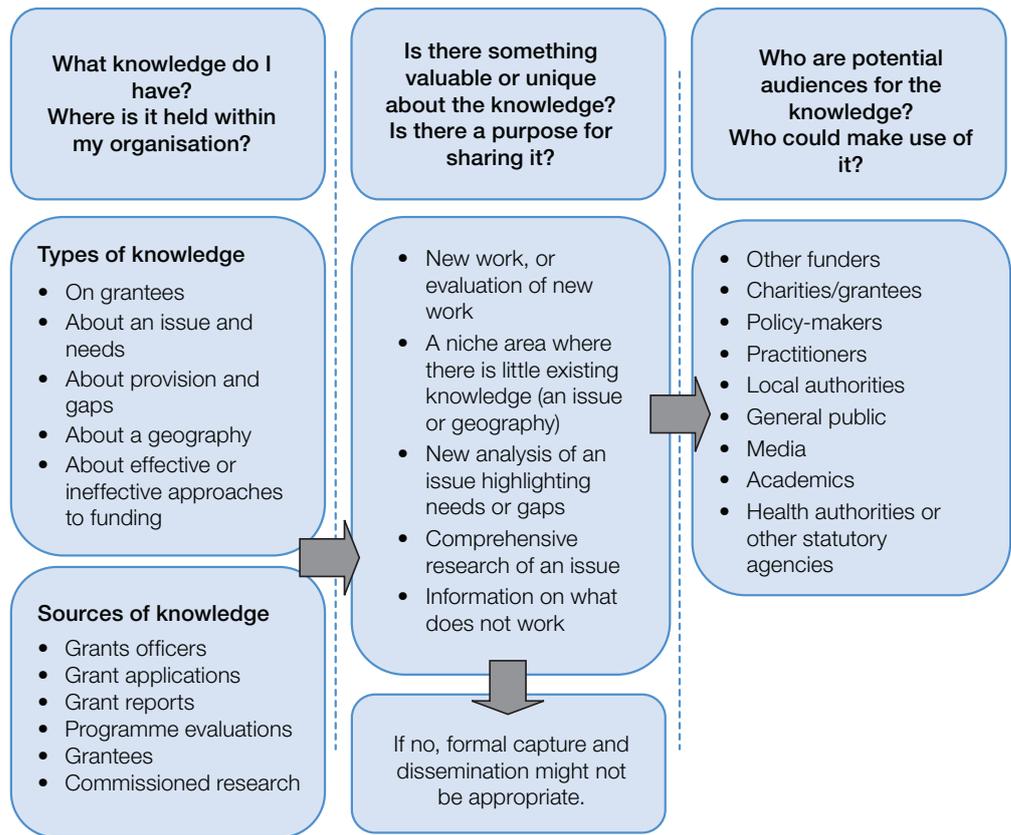


Figure 3 maps out some of the questions that funders need to ask themselves, and some of the knowledge that they may have that can be usefully shared.

### D. How can I effectively share knowledge?

Having decided what knowledge they have that can usefully be shared, funders will need to think through how they go about sharing it. This will depend on a range of factors, including: their **objective** for sharing it (simply to put it into the public domain for others to use, or to create a specific change to policy or practice); their **resources** (the level of time, money and effort they are able to put into sharing); and the **form** that their knowledge is in (whether it is tacit or explicit, sensitive or publishable).

At present, one challenge is that funders do not always have a clear aim for the information that they are producing or an idea of who will find it valuable. Communication is often tacked on at the end of a project or review and often does not have a clear purpose or audience. As a result, those receiving reports say that they feel overloaded with information that is not obviously relevant to them, and many reports are simply not read.

It is encouraging that organisations are investing in making information widely available. But if there is not a clear demand or target audience,

it is difficult to determine whether it is a good investment, particularly as sharing in this way can be expensive. For example, one funder that NPC spoke to admitted that it had no clear audience in mind for the report it produced (which had been driven by the communications team’s need for a tangible product), and the funder was privately sceptical about whether it had any impact for the £12 per copy it cost to produce.

Funders should consider different approaches to knowledge-sharing, depending on their resources and what they want to achieve. Figure 4 shows three different models for thinking about sharing. **‘Signalling’** can be used to make other audiences aware of what you have, flagging up your expertise in a low-cost way, so that other organisations can come to you. A **‘dissemination’** approach to knowledge-sharing focuses on what funders have to say (knowledge supply) and how they can make it available, typically through large-scale report production and one-off events. What one report calls a **‘marketing’** model is used for targeting specific audiences with particular aims in mind. This sees knowledge-sharing as a ‘demand-focused discipline’. This means that it is *‘developed with specific groups of users in mind, designed to address their needs and problems, delivered in ways that reach those users, and ultimately applied by those users.’*<sup>xiii</sup>

One report cost £12 per copy to produce, yet the funder was privately sceptical about whether it had any impact.

Figure 4: Approaches to knowledge-sharing<sup>xiv</sup>

	Signalling model	Dissemination model	Marketing model
<b>Objective</b>	<ul style="list-style-type: none"> <li>Focuses on <b>knowledge supply and demand</b> (What do we have that others might want?)</li> <li>Seeks to <b>make expertise known</b> to others (How can we ensure our knowledge is available at low cost and effort?)</li> <li>Approaches knowledge-sharing as a <b>demand-led, reactive process</b> (How can we let others know that we have knowledge?)</li> </ul>	<ul style="list-style-type: none"> <li>Focuses on <b>knowledge supply</b> (What do we have to say?)</li> <li>Seeks <b>information access</b> as the goal (How can we ensure that our knowledge is widely available?)</li> <li>Typically approaches knowledge-sharing as <b>one-time products</b> (How can we package and deliver our knowledge in a product?)</li> </ul>	<ul style="list-style-type: none"> <li>Focuses on <b>knowledge demand</b> (What knowledge do users need?)</li> <li>Seeks <b>informed action</b> as the goal (How can we ensure that our knowledge is widely used to improve practice?)</li> <li>Approaches knowledge-sharing as a <b>long-term, ongoing process</b>. (By what process can we ensure that our knowledge is absorbed by practitioners?)</li> </ul>
<b>Resources</b>	Low	High	High
<b>Form</b>	Usually tacit	Usually explicit	Explicit/tacit

<b>Method of sharing</b> (see Section 2D)	Blogging	Large report mailouts	Target opinion leaders
	Website	One-off events	One-to-one meetings
	Issue Based Networks (ACF)	Press release	Practitioner networks
	Conferences	Magazine	Tailored messages to audience segments
	E-newsletters		

Knowledge-sharing should be a 'demand-focused discipline'.

“The philanthropy world is cagey and polite; when you’re honest and blunt people notice.”

Most innovations come from small conversations among practitioners.

## Recommendations for funders

These recommendations are intended for staff within funders that are looking to improve the way that they learn and share knowledge. Some solutions will lie beyond the means of individual funders (to see NPC’s recommendations for the sector as a whole, readers should turn to page 31). We are indebted to a report by the Williams Group called *Marketing your knowledge* for many of the insights about sharing knowledge here.

**Build a culture of learning.** There needs to be a strong commitment to learning and knowledge-sharing at every level of an organisation. The CEO usually drives improvements and trustees need to be convinced of the value of learning and knowledge-sharing. This needs to be meaningfully embedded and communicated to individual staff and teams within funders (eg, in job descriptions).

**Translate learning into action and knowledge into practice.** Develop tools, frameworks, instruction materials, worksheets, illustrative case studies, or anything that allows practitioners to apply knowledge to the particular circumstances of their work. This is relevant both for funders developing a culture internally and for sharing what they know externally.

**Be selective about what you gather and share.** Data should not be collected simply to establish an exhaustive internal knowledge library. Nor should all information be pushed out: those receiving reports say that they feel overloaded with information.

**Address real problems and needs.** Determine how what you know helps to solve a clear problem or need. If it does not, do not put a lot of effort into sharing it. This may involve conducting market research on what users need (for example, testing demand through umbrella bodies) and creating feedback loops to understand what audiences want. Consultations and surveys are useful for this (see Section 2A).

**Signal what you know.** Funders with limited time or resources to invest in knowledge-sharing could do more to ‘signal’ what they know to others, for example, through publicising areas of expertise on their website, via newsletters or blogs (or commenting on others), and through sector bodies such as ACF.

**Segment audience.** Pick a niche and write something for that niche. *‘In philanthropy, sharing knowledge is much more connected to subfields than to the field as a whole.’*<sup>xv</sup> To do this, funders should:

- **Start small.** Early adopters are important. Most innovations come from small conversations among practitioners.
- **Target networks.** Practitioner conversations are much better than information broadcasts. Peer-to-peer networks and regional or umbrella bodies are important for repackaging knowledge and seeing things through the eyes of members.
- **Target opinion leaders** and shape knowledge so that it is easy to recycle. Funders may need to give up a sense of ownership if they want others to champion their ideas.

**Time your dissemination.** Audiences are most open to new information at times of change (eg, board, leadership or staff transitions, or at the beginning of new funding programmes). Build appetite for knowledge, for example, through interim briefings, and follow up after knowledge is given. Link to other resources through emails and newsletters with short paragraphs and links.

**Shape products.** Use clear messages and short, simple formats. Provocative arguments and memorable stories are also effective: *‘The philanthropy world is cagey and polite; when you’re honest and blunt people notice.’*<sup>xvi</sup>

**Share mistakes.** Although funders are understandably reluctant to ‘name and shame’ grantees, they could discuss other types of mistake more openly, such as programme designs or approaches to evaluation that have not worked. Foundations that have publicised their mistakes have received positive feedback and have helped to foster a culture in which learning and transparency are more accepted (see Section 2B).

# What are funders currently doing?

This section provides examples of the different ways that funders learn from their own work and that of others, and share that knowledge externally. It also provides a summary of what is known about the costs and benefits of different activities. This is intended to give funders ideas of different types of activity that they can undertake. It is structured around the four types of activity outlined in Section 1:

- A. **Gathering** knowledge from external sources
- B. **Creating** knowledge externally
- C. **Developing** knowledge from within the funder
- D. **Sharing** knowledge with external audiences

## A. Gathering knowledge from external sources

Gathering knowledge is about learning from what others are doing. There are two typical scenarios in which foundations need to gather knowledge. First, in a one-off review: for example, to inform a strategic review or development of a new programme. Second, to stay up to date with a topic, such as new research on grant-making or the focus of a grant-making programme.

### What is currently happening?

#### Funders are gathering information from other funders

Many foundations produce reports or run events on programmes that they have funded, social issues and grant-making practice.

**Reviewing existing reports** is one way that funders gather information from their peers. Funders may also attend **events and conferences**, linked to the launch of reports.

However, much of the knowledge that funders need is not documented in reports or notes, but lies in the heads of peers in other organisations. There is **casual learning** between some grant-making organisations, and decisions are made on the basis of the judgement and opinions of other funders.<sup>xvii</sup> Many funders are open to **meeting with other funders** to access this knowledge, although this often requires a good understanding of who is doing what and sometimes a level of trust. So some smaller, regional or less established funders are finding this difficult.

When it comes to more practical knowledge, **staff exchanges, shadowing** or **study visits** are occasionally used to obtain 'how to' knowledge from other funders about ways of working (eg, use of database for grants management, ways of processing grants applications). One good approach is a staff exchange where a staff member from a funder spends a day at another funder, learning about their systems and processes. For example, the Barrow Cadbury Trust was concerned that it was not using the GIFTS programme (for monitoring grants) in the most effective way, and arranged for its programme administrator to spend time in other trusts to learn from their approaches. Staff study visits are also being used at a more strategic level to learn from peers (see Box 2).

#### Box 2: A foundation study visit

In March 2010, staff and trustees from Cripplegate Foundation in North London visited the Community Foundation for Northern Ireland (CFNI). The visit came about through a seminar at the Association of Charitable Foundations (ACF) where Cripplegate identified common interests and approaches between itself and CFNI.

Cripplegate staff travelled to Belfast for two days and met with the CFNI director and six members of staff. They visited a women's project in the Upper Ardoyne, and discussed both programmatic areas as well as approaches to grant-making.

Both funders found the visit very helpful, providing an opportunity to review and reflect on their work. Cripplegate subsequently documented lessons from the visit which it shared with its trustees. The Foundation has used the findings to review its small grants programmes, to actively identify 'forgotten communities' and has highlighted the need to align community development to long-term investment in an area. The two funders will be arranging further joint seminars to continue the conversations started in Belfast. The cost was two days of staff time, as well as direct costs such as travel.

#### Funders are gathering information from charities

Grant-makers gather information from **application forms** and **monitoring and evaluation** (M&E) reports. Application forms show funders what priorities charities have and help to identify needs in a particular area or issue. Monitoring and evaluation also help funders to assess what works, what challenges charities face and areas for development. This is an area that has seen significant improvement in recent years, although evaluations are not routinely published at present.

Funders sometimes conduct **consultations** or surveys of charities. For example, Trust for London (formerly City Parochial Foundation) recently surveyed applicants, which provided valuable feedback about its application process and other aspects of its work that can be used to improve processes. Similarly, the Esmée Fairbairn Foundation surveyed charities and found that one of the things they most wanted was the opportunity to get together with colleagues working in the same field.

As a result of demand from their consultations, both Trust for London and Esmée Fairbairn regularly **convene grantees**, providing them with a space to discuss challenges, share practice and develop new ideas. This can help identify common challenges they face and result in lessons about good practice or messages for policy-makers. In feedback, charities also say they find it a useful way to gain knowledge from others and make contacts.

In March 2010, the Big Lottery Fund (BIG) organised a **conference** to learn from and share learning between grant-holders across England who were funded through its Well-being programme. Feedback from those present informed the development of BIG's working practices and evaluation strategy, ensuring that these remained relevant and appropriate to the needs, capacity and interests of the funded organisations.

### Funders are gathering information from policy-makers and experts

Funders report that bringing leading experts together in a **roundtable** or **masterclass** can help to address a specific question a funder faces. It also can have the valuable effect of enabling a conversation between parties who might otherwise not speak, for example, grassroots organisations and think tank staff

#### Box 3: Expert Roundtables

Barrow Cadbury Trust held a roundtable with around 30 people in March 2010 to inform the development of its Poverty and Inclusion Strategy. The meeting brought together three distinct types of organisation (and staff from the Trust):

- 1) grassroots activists who were also strategic thinkers (chosen from its Birmingham groups);
- 2) third sector infrastructure organisations working in community development; and
- 3) think tank partners.

This created a '*potent mix of idealists, pragmatists and strategic practitioners*' which led to lively debate. The costs to the Trust were minimal (the train fares of the Birmingham participants and the Director's time to prepare and chair it) and there were a number of benefits, both to the Trust in helping inform its strategic thinking, but also to the participants, as they heard different perspectives.

(see Box 3). Another approach is inviting one expert to share knowledge with a group of funders working on an issue.

### Funders are using networks and events

**ACF** and other **funder networks** are seen as 'safe spaces' where funders can learn and share knowledge with peers. Staff are willing to give their time at conferences, one-on-one meetings, and through affinity groups. A number of formal networks exist that funders can join, and members report that informal networks can grow out of larger formal ones. ACF's **Issue Based Networks (IBNs)** and **Professional Development Programmes (PDPs)** provide opportunities for funders to discuss specific issues and learn from peers. There are some geographically specific forums including London Funders, and the East Midlands Funding Forum, as well as Funding Forums for Northern Ireland, Scotland and Wales. Some funders are members of the Intelligent Funding Forum (IFF) or the Woburn Place Collaborative (WPC).\*

### Funders are gathering information through volunteer networks

Some funders are using **volunteer networks** to gather knowledge on charities around the country. Henry Smith Charity uses a network of 32 'Volunteer Visitors', which covers the whole of the UK. These volunteers are given training and guidance, and then asked to visit potential grantees in their area where a grant of £10,000 or more is under consideration. They meet with the staff and write a report for the grants officers and trustees.<sup>xviii</sup>

Four Acre Trust also makes innovative use of volunteers to gather knowledge on charities. It has a team of 20 'field officers' whose role is to liaise between applicants and the Trust. The field officers are people with business experience and an understanding of the Trust's criteria and ethos, who are prepared to give their time pro bono. They work alongside applicants from the very early stages, through consideration by trustees, to the delivery and reporting of the project. This has helped to increase the number and quality of repeat grants and refine the process of initial application at minimal cost.<sup>xix</sup>

### Funders are gathering knowledge from literature on grant-making

Some funders gather knowledge from sources such as **Trust & Foundation News**, a quarterly magazine produced by ACF, and from **GrantCraft**, **KnowHow NonProfit**, **Foundation Source**, **Philanthropy UK**, and **Alliance**. Individual funders also produce reports on grant-making practice.

## B. Creating knowledge externally

Funders invest in research, evaluation and other activities to develop new ideas and solutions to the problems they identify in their grant-making. However, these activities are sometimes perceived to be expensive and so may not be undertaken by smaller funders.

### What is currently happening?

#### Funders are commissioning research

When funders identify a gap in existing knowledge, or struggle to gather information from other sources, they are **commissioning research**. Research is sometimes commissioned with the specific aim of influencing government or the public, but funders also conduct research to inform their own strategies, which later turn out to have implications for wider audiences and so need to be shared (see Box 4).

#### Funders are commissioning evaluations

Increasingly, funders are commissioning **external evaluations** to identify lessons that they might not spot themselves. This can also help in disseminating findings (if the evaluator is well connected). Formal evaluation is playing a growing role in the development and application of knowledge in the sector, and there is a trend towards evaluations being conducted externally because this is deemed to be more objective.

Linked to the results of evaluations, a small number of funders are **publicising programme failures**. As the head of the Center for Effective Philanthropy has said: *'There's an increasing recognition among foundation leaders that not to be public about failures is essentially indefensible...If something didn't work, it is incumbent upon you to make sure others don't make the same mistake.'*<sup>xx</sup> For example, the Hewlett Foundation took the unusual step of publishing a significant programme failure on its website, and sharing the lessons of what went wrong (see Box 5).

**Grantee perception reporting** involves gathering grantee feedback on funders to help improve funding practice. It has been established in the US by the Center for Effective Philanthropy (CEP), and is beginning to be adopted by a small number of funders in the UK. For example, the Pears Foundation and Paul Hamlyn Foundation have both received reports from CEP, which compare grantees' ratings of the foundations on issues such as quality of interactions, clarity of communication, and level of non-monetary support, with other foundations. The comparative data provides a strong indication of the overall picture of their performances, and points to areas in which they can seek to improve.

Starting in 2006, the US-based Knight Foundation hired **investigative journalists** to evaluate its programmes. The journalists were tasked to write clear, honest, factual and

“If something didn't work, it is incumbent upon you to make sure others don't make the same mistake.”

#### Box 4: The impact of a report: *Invisible Islington*

Cripplegate Foundation focuses on poverty in Islington in North London. It was keen that its grants met the real needs of the local population and wanted to conduct research to better understand what these needs were. It was conscious that a lot of good research had already been done on poverty by other funders, providing overviews and statistics on the problem, but it felt that there was a gap in looking at poverty in a more local way.

The Foundation therefore commissioned research that aimed to go beyond statistics and allow people in Islington to tell their stories about the impact of poverty on their lives. It was well placed to do this due to its knowledge of the area and of the charities working there, and this access enabled the researchers to profile a range of individuals, highlighting the challenges in their everyday lives: from the impact of debt and poor health, to their restricted movement within the borough.

By looking at poverty in a new way, the Foundation was able to rethink the actions needed to tackle it and developed a five-year grants strategy in response. More widely, publishing the report has been 'transformational' to the way that the Foundation has worked, and shifted it from a focus purely on grant-making to an awareness of what else it can do. It has used the findings to challenge the local authority about the nature of services that it provides, and helped to influence local funding towards the areas of real need.

The report cost approximately £35,000 to research, produce and disseminate, as well as a major investment in staff time. However, it has helped to influence around £1.5m in local funding and has received coverage from major media (Reuters, Economist and BBC) and influenced local services. For example, it led to a new Debt Coalition in Islington, which has developed a common debt recovery protocol to be adopted by all council departments, and compiled Islington's first comprehensive directory of advice services. It also led to the development of Islington Giving, a new partnership of local funders sharing knowledge and acting together.\*

\* Five Islington trusts have recently formed a partnership to encourage long-term investment and re-examine ways of tackling poverty. Highlighting local need, identifying solutions and encouraging new philanthropy are key, and it has provided new opportunities for collaboration and influence.

‘Sure, it’s better to tell your success stories, but there’s no harm in sharing our failures, too. The only thing at stake is our egos.’

**Box 5: ‘No failure but failure to learn’**

From 1996 to 2006, The William and Flora Hewlett Foundation committed over \$20m to a ‘Neighborhood Improvement Initiative’ (NII), designed to improve the lives of residents in three California communities. The Foundation enlisted three community foundations as ‘managing partners’, and created new organisations as well as involving existing ones in the neighbourhoods.

Despite the huge investment of financial and human resources, however, the NII fell far short of achieving the hoped-for improvements in residents’ lives. An external evaluation of the programme found that the effort lacked focus and moved much more slowly than anticipated. Hewlett ended up having to create new nonprofit groups to accomplish its goals, and relations with community foundations were strained by differences in goals and cultures.

However, rather than burying the lessons of this experience and presenting ‘good news stories’ of the aspects that worked well, the Foundation took the brave step of publicising the lessons about what went wrong and openly describing its mistakes in the media. Its President, Paul Brest, said: *‘Foundations are supposed to take risks... Sure, it’s better to tell your success stories, but there’s no harm in sharing our failures, too. The only thing at stake is our egos.’*<sup>xxi</sup>

transparent quarterly reports that attempted to ‘draw out something close to the truth’ about the results of the Foundation’s programmes. The journalists were given full access to internal Knight Foundation documents and employees, and free range to pursue the story of what really happened through interviews with grantees, community leaders and anyone else of the reporters’ choosing. The former vice president of communications for the Foundation concluded that the resulting reports were ‘more direct, even critical, than any prior Knight Foundation attempt to evaluate and assess’, and that they produced profound insights into the intent and outcome of major initiatives.<sup>xxii</sup>

**Funders are convening groups**

Convening charities or other groups can be both a way of gathering existing information and of creating new ideas. Trust for London convenes **learning seminars** for its grantees. It brings charities from similar fields together to discuss good practice or challenges in a particular area, for example, to discuss the infrastructure support needs of Somali community organisations, or how employment opportunities can be improved for people with learning disabilities. Seminars may include presentations, and findings are often documented and published or sent to policy-makers or practitioners. Feedback from attendees suggests that they really value these events and would like more of them from other funders.

**C. Developing knowledge from within the funder**

Funders generate knowledge through their own work. This knowledge is often ‘trapped’ in the heads of staff and requires some effort to extract it into a usable form. For example, grants officers may need to spend time reflecting on lessons from reading grant applications, or funders may need to develop systems to capture data about applicants and grantees.

**What is currently happening?**

**Organisations are capturing knowledge from their staff**

Grants staff at some funders set aside specific time to share knowledge and **develop lessons** on particular topics. Some have **internal newsletters** to try to capture and share knowledge. Standard project summaries can be useful for internally sharing information about new projects, including brief paragraphs on ‘what we are doing’, ‘why we are doing it’ and ‘what the intended impact will be’. This can later be used as a baseline when evaluating the impact of a project.

Trust for London gathers information and develops knowledge through its application process. This involves **bringing grants officers together** over two days to discuss applications and broader information each has gathered through events and discussions. This improves decision-making, increases learning about the external environment and helps staff to process their learning and refine their priorities. The Trust has learnt that it is important to structure these discussions and a senior staff member takes notes to document the key learning points.

## Funders are developing systems for extracting knowledge

Some funders have developed **data collection processes** to collate information from the applications and monitoring data they receive. The Nominet Trust is asking all of its grantees to complete evaluation forms identifying lessons that might be useful for other organisations, which will be shared on an accessible online form (see Section 3).

Larger funders such as the Big Lottery Fund have **designated staff members** or teams with responsibility for learning and knowledge management. They investigate the lessons coming from existing work and feed it into new work, and are developing the systems and technology to improve access to internal knowledge, for example through a 'wiki' (see Box 6). The Research and Learning team also produces **research digests**, which assimilate existing research documents produced by government, other funders, researchers or academics in a given period. Circulating these with short abstracts helps to avoid duplication of effort between different parts of the organisation.

**Internal evaluations** are sometimes used to assess funding programmes, though these tend to be used for special initiatives rather than for grants in general. The main point at which funders do this is during **funding reviews**, when they reassess their priorities. However, some funders such as BIG have an established **'lessons learnt' process** for capturing knowledge through the lifecycle of the programme: when the development of a programme is complete, when a certain amount of funding has been allocated, annually (if a long programme), and at the end of a programme.

## Funders are building a culture of learning in their organisations

Some funders are attempting to create a culture of 'day-to-day learning', through encouraging grants officers to share what they come across, form links, and provide situations in which they can make their knowledge explicit. Designating **knowledge 'champions'** is one way that this is done, through having a recognised central point of contact for all knowledge relating to

### Box 6: What I Know Is...

The Big Lottery Fund recently started a 'wiki' to improve access to and sharing of knowledge within the organisation. A wiki is a website that allows the easy creation and editing of any number of interlinked web pages. BIG's wiki is a searchable database where staff can add information, categorise knowledge, and tag and search for things that they need. It covers internal procedural information and Frequently Asked Questions, as well as information for specific grants teams.

Over 100 members of funder staff have accounts, and, as more information is added over time, it should become an increasingly useful resource for staff. A forum hosted on the wiki site enables internal dialogue and discussion between different parts and levels of the organisation. Wikis are easy and cheap to set up through existing software such as 'MediaWiki', though they require staff time to maintain, moderate and generate staff interest. They are an effective way of developing and sharing knowledge, particularly in large organisations.

a sector or type of knowledge, for example, public affairs, or monitoring and evaluation. It then becomes this person's responsibility for developing knowledge on a specific topic within the organisation and sharing it among staff and externally.

The Esmée Fairbairn Foundation describes the difference in culture that can be created through the **physical environment of the office**, in which colleagues from different teams are given opportunities to share ideas. Shared 'breakout' spaces and hot-desking can help to break down internal 'silos' between different teams, ensuring that ideas are shared and different parts of an organisation talk to each other.

## Funders are recruiting specialist staff

Increasingly, larger foundations in the US have **'knowledge management' posts** to develop and exploit the organisation's resources. For example, at the Annie E. Casey Foundation, evaluation, communications, and knowledge management roles account for 12 of 180 total staff.<sup>xxiii</sup> The Foundation believes that investing in knowledge management has improved its efficiency. Through an **internal audit of knowledge**, it managed to streamline its technology spend, reduce duplication, and improve institutional memory.<sup>xxiv</sup> It is also creating **'safe spaces'** where staff can share examples of what worked and what did not.<sup>xxv</sup>

### Box 7: Learning to improve efficiency

The City Bridge Trust saw a dramatic increase in applications between 2004 and 2006. This was a time-consuming process for the Trust but also a burden for applicants who completed proposals but did not receive funding. It decided to review its disability programme because its criteria were quite broad. As a result, it sharpened the focus of the programme and by 2007, the number of applications had reduced by 48%. The Trust was able to improve its efficiency, freeing up its grants officers' time to focus on the quality rather than the quantity of applications. This also improved efficiency for organisations who did not spend time on unsuccessful applications

'Knowledge harvesting' is sometimes used to elicit the tacit knowledge of key staff.

### Funders are 'harvesting' knowledge

Regular review sessions are increasingly being used to extract knowledge from the heads of foundation staff in the US. This is sometimes referred to as '**knowledge harvesting**' and involves using an interviewer (often a former journalist) to gain access to the tacit knowledge of key staff. This aims to make better and wider use of knowledge by extracting it regularly and making it available to a broader range of people. It ensures that programme staff are able to articulate the lessons they learn in their work without having to spend a lot of time and effort writing it up.

The Ford Foundation has **internal archive staff** to document knowledge from programmes, and also found its **exit interviews** so useful that it started doing them on an annual basis even when staff were not leaving. The Robert Wood Johnson Foundation also uses journalists in its grants evaluations (see Box 8).

### D. Sharing knowledge with external audiences

At present, funders are primarily sharing knowledge in two ways. First, explicit knowledge is being shared through published reports, often sent out in large numbers to a wide audience. Second, tacit knowledge is shared through meetings and events with trusted peers.

#### What is currently happening?

#### Funders are disseminating reports

Most foundations **produce reports** on programmes that they have funded, social issues and grant-making practice. Increasingly, foundations are making publicly available all reports they or their grantees have produced. Some funders are starting to include **conditions within grants agreements** to ensure that their grantees have a plan in place to disseminate

their work. Given that those receiving reports say that they feel overloaded with information, effective summaries are essential (see Box 9).

#### Funders are hosting events

Many reports are launched through **events** such as conferences, debates, or breakfast meetings, to generate excitement and discussion around a topic. A number of funders see this as essential in creating opportunities for discussion and debate, and for bringing different audiences together. For example, The Diana Princess of Wales Memorial Fund runs 'Insider Knowledge' events to share lessons with funders and other audiences. Another approach is using **open space events**, which are based around workshops that participants create and manage themselves. A trained facilitator can be beneficial in getting such events to run effectively. For example, one funder recommended Getting on Brilliantly.<sup>xxviii</sup>

#### Funders are using new media

Increasingly, funders' **websites** are being used as 'online storage rooms' for research and grantee reports. Using websites tends to be quicker and cheaper than communicating through old media and has a number of other advantages: participation is measurable, data is easily searchable and it encourages greater interactivity between the sharer and audience. A small number of funders are starting to explore **social media, blogging** and **Twitter**.

Over recent years, Joseph Rowntree Foundation (JRF) has shifted its dissemination strategy from large print mailouts, to more targeted **electronic marketing**. Instead of sending out high numbers of paper reports, it now has a specialist **Contact Relationship Management** system to target its research at key individuals and organisations. JRF chose to use more electronic formats for a number of reasons: to target audiences that are increasingly connected to the web and other forms of mobile technology; for environmental

#### Box 8: Investing in knowledge management and sharing

The Robert Wood Johnson Foundation is seen as a leader in the field of knowledge management and communications. It spends an estimated 25% of its total budget on assessing its work, codifying knowledge, and communicating it within and beyond the organisation.<sup>xxvi</sup> Around one fifth of its grants are communications-related.<sup>xxvii</sup>

The Foundation has a Grant Results Reporting Unit, which is run by two co-coordinators, a former evaluator and a former journalist. Once a project or programme is completed, an external writer reviews reports and publications from the initiative and interviews its project director and, if appropriate, RWJF's programme officers and evaluation staff. This enables the writer to glean lessons from the work and to illuminate important aspects of project accomplishments. The report is then edited internally and externally before being posted online.

**Box 9: Findings papers**

The Joseph Rowntree Foundation's (JRF) *Findings* papers are concise summaries of their research reports. The format was established in 1989 and, due to its popularity, has not significantly changed in the last 20 years: *Findings* papers are 2,000 words long and are designed to be accessible and contain all the important information of a report in a concise, jargon-free form. Currently, a draft summary *Findings* is a standard minimum output for each JRF research project.

Many funders that NPC spoke to see JRF's *Findings* as an example of best practice in the sector and wanted more organisations to produce similarly concise research summaries. Funders say that they stand out from the enormous volume of research in the sector and enable them to grasp the key messages very quickly. JRF is planning to review the *Findings* format in 2011 alongside its other publications, and will consider whether it needs to produce something even shorter that is better suited to new forms of media.

New media can help to improve targeting and save money.

reasons; and to be more nimble—print dissemination has longer lead times due to publishing and mailout. Anecdotally, the Foundation believes that the targeted method has saved money through fewer reports being printed.

**Funders are using press and magazine publications**

Most funders seek to share information through **national or sector press**. This traditionally involves issuing a press release and generating interest among relevant sector journalists.

**Magazine-style publications** are also used by some funders to generate wider interest within the sector, and are often disseminated in both hard copy and electronic formats (see Box 10). These can be effective for translating programme evaluations into material that is accessible for other audiences.

**Funders are using partners**

Some funders such as the Joseph Rowntree Foundation sometimes pay relevant **membership or umbrella groups** to disseminate findings within a specific sector. These groups have existing networks and can reach large numbers of organisations more quickly and effectively than a funder that knows the landscape less well.

Some funders have internal communications staff or pay for external **public relations expertise** to ensure that their messages reach the right audiences. Agencies are also used to provide communications training to grantees involved in campaigning.

**Funders are sharing through networks**

Some funders share what they know through networks and links that they make at events and conferences (see Box 11).

**Box 10: The Knowledge**

*The Knowledge - Learning from London* is a 'bite-sized', occasional publication from The City Bridge Trust in which the Trust shares some of the lessons it has gained as a result of its grant-making in London. It developed out of a need the Trust identified to put its findings into a more accessible and 'punchier' format than formal evaluations.

The publications have received good feedback from charities and funders, and in some cases have helped to influence policy. For example, the first edition, *Greening the Third Sector*, helped to raise awareness of environmental issues in the third sector. It fed into the Charity Commission's guidance for charities, and influenced the Third Sector Task Force on Climate Change and other funders.

CBT has found that commissioning a good writer is key, and timing also makes a big difference. *Greening the Third Sector* worked particularly well because climate change was very topical in 2007. By contrast, when its edition on knife crime, *Fear and Fashion*, was published, the market place on this issue was quite crowded, thereby diluting its impact, although the *Fear and Fashion* 'brand' has gained currency amongst commentators.

Commissioning a good writer is key, and timing also makes a big difference.

Local funders can be the 'eyes and ears' on the ground for national funders.

### Box 11: The importance of local knowledge

The Francis C Scott Charitable Trust (FCSCCT) commits over £1m every year to charities operating in Cumbria and North Lancashire, principally concerned with meeting the needs of children and young people.

Though it operates locally, the Trust is an important source of knowledge for several national grant-makers, who regularly contact the Director for views and advice on local charities. It operates as the 'eyes and ears' on the ground for national funders that do not have the staff capacity to visit every project that they fund, and ensures that national funding is being informed by local knowledge and personal contact with the grantee.

FCSCCT also benefits from these relationships by helping to draw in funding for its grantees from outside the region. They also provide the Trust with access to the expertise of larger, national funders on mechanisms for giving and other aspects of funding practice.

The Trust emphasises the importance of networking and building trust through working relationships as the keys to effective learning and knowledge-sharing. The Director also highlighted the danger of over-formalising systems of sharing, as there is a chance that funders will all support the same charities in an area and diversity of approaches will be lost.

### Funders are developing online resources

Most funders include a list of published reports on their website, and the ACF has created forums for discussion and centralised resources. However, the **online resources** that do exist have not been widely used. One interesting example may be the Nominet Trust's new Knowledge Centre (see Section 3).

### Funders are sharing knowledge with policy-makers

Funders attend **parliamentary groups**, meet directly with policy-makers and respond to **consultations** in order to share their knowledge at a political level. Regional funders are providing information on local needs and interventions to local councils and commissioners. There are numerous ways in which independent funders share knowledge with policy-makers. For specific examples, readers should see Diana Leat's book, *Just Change*.



Photo supplied by Kristian Buus.



Photo supplied by Kristian Buus.

## The costs and benefits of different approaches

Funders need to understand the costs and benefits of different approaches to learning and knowledge-sharing. We have collected information from funders where possible and attempted to give some rough estimates for different activities. However, the quality and quantity of data available is very limited, and estimates should be treated with caution. Developing a better understanding of financial costs would help funders to make better decisions about how to invest in learning and knowledge-sharing.

Option	Costs and challenges	Benefits
Funder meetings	Staff time to network and meet. Tends to be at CEO level: it is sometimes difficult for practitioners to find opportunities. Can be inaccessible to smaller, regional funders.	Informal meetings are where the majority of tacit knowledge is shared, including information on concerns and problems that is often not documented or shared in public.
Staff exchanges	Relatively inexpensive, considering potential benefits. One to two days staff time. Costs £500–£1,000. May be difficult to identify the right partners for exchange.	Provides opportunity to reflect and learn from peers at both strategic and practical level. Valuable for practitioners to spend time in other organisations.
Grantee consultation	Surveys of grantees are cheap, but staff time needed for good response rate.	Provides honest feedback on grants application process.
Convening grantees or experts	Some set-up and preparation costs, but funders usually have a venue.  Running the day can be demanding.  Funders may need to pay experts.	Charities say that opportunities to get together with peers is one of the key ways that funders can add value.  Expert roundtables are a good way of accessing lots of information very quickly.
Funder networks	£95–£5,000 membership of ACF per annum depending on organisation size.  Local networks are often free to join but depend on contributing staff time.	Excellent networking opportunities and 'safe spaces' for informal gathering and sharing.  <i>One funder says: 'Without ACF you wouldn't know where to start.'</i>
Attending conferences	One funder estimates spending three staff days per month at external events.	Excellent opportunities for networking and gathering knowledge quickly.
Commissioning research	£30,000–£100,000, and more if research is complex and conducted over more than a year.	Fills a gap in existing knowledge. This can be very powerful in advocating behaviour or policy change.
External evaluations	£30,000 for an individual project.  £80,000 for an external evaluation of a strategic review of a programme.	This can also help in disseminating findings (if the evaluator is well connected).
Staff learning sessions/ reviews	Staff time to prepare, deliver and attend internal presentations and workshops.  Institutionalising learning sessions can be time-consuming and can become formulaic.	Helps funder staff to process learning, share information and refine priorities.  Improves decision-making.
'Knowledge harvesting'	Employing a freelance journalist may cost in the region of £250 per day. Interviews and write-up takes around two hours per staff member.	Programme staff are able to articulate the lessons they learn in their work without having to spend lots of time and effort writing it up.
Designated staff members	£35,000–£45,000 per annum for learning and knowledge management posts.	Can help to embed culture and processes for learning.
Internal evaluation	Staff time. Problems associated with subjectivity, conflict of interest and over-familiarity with the object of evaluation.	Good understanding of the organisation and the context of the work. An internal evaluator can act as an advocate for evaluation and for using the findings within the organisation.

Option	Costs and challenges	Benefits
Data analysis	Staff time and IT costs vary. Developing an online platform and standardised form for gathering and publishing grantee evaluation data costs in the region of £30,000.	Systematic data collection can help to identify trends, and publishing it can benefit the sector as a whole.
Reports	Time-consuming to produce and disseminate. Design, print and dissemination costs are likely to be in the region of £3,000–£10,000 for 500 copies of a 100-page report. Hard copies more expensive than electronic.	A high-profile report may be downloaded up to 20,000 times in a year. However, it is more normal for a research report to be downloaded around 1,000 times in the first week and then a similar amount over the course of the year.
Events	An RSA event for 200 people costs £5,000 (no food or drink included). Can cost much more though costs may be recouped through ticket sales. Events can often exclude audiences from other geographical areas.	Generates excitement around a report. Opportunities for discussions and debates. Good for building brand, networking and presenting lots of information in one day.
Presenting at conferences	Staff time to prepare and present.	Presenting at others' conferences and events is a cheap way of signalling what you know to a range of audiences.
Setting up your own website	IT costs, time (visible website attracts more applications, which take time to process). Costs include staff time and external agency costs (eg, technical and design).	High-profile funder websites receive around 125,000 visits per month, smaller organisations around 10,000 per month.
Blog	Updated daily costs £7,500 per annum, weekly £1,500 per annum.* Easy to start but hard to maintain. A bespoke blog can take months to set up.	Directs traffic to website, and to reports. Low-cost way of publicising research. 500 readers per month. A Wordpress or Blogger site can be set up in hours.
Twitter	Minimal staff time. Only transmits limited information. Audience is quite narrow (mainly journalists).	A well-publicised Twitter account can attract over 1,000 followers within a few months. Cheap way of flagging up news and signalling readers to new reports or blogs.
E-Newsletter	Around 1.5–2.5 days staff time to produce material, build mailing lists, monitor replies. Email marketing software costs £100 set-up and £45 per month to send 5,000 emails per month. Some funders report 'drowning' in number of e-newsletters.	Simplest and quickest way to reach large numbers of people, and low-tech. Allows readers to contact you through clicking 'reply' links. One funder aims for a 50% opening rate and 10–15% click-through.
Magazine	Lots of staff time. A 12-page magazine of new material can take seven to eight staff days; then costs include editing and designing (£1,000), and printing and mailout (£1,000).	Builds your profile as a thought leader. Good for relationship building. Better for audiences that are less familiar with digital marketing. Something tangible to hand out at events and meetings.
Public relations and press	Can be costly, time-consuming and unpredictable. An external agency may cost £1,000–£5,000 per month.	Boosts traffic to website, helps organisation to reach new audiences, builds relationships with journalists. Good at identifying press-worthy messages from research and training grantees in how to influence and communicate.

\* Based on a blog entry taking one hour to write, and a staff salary hour of £30.



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# The infrastructure for learning and sharing

As well as activities undertaken by individual funders to learn and share knowledge, there are also resources available to the sector as a whole to facilitate sharing and improve the flow of information. For example, infrastructure exists through **membership bodies** (such as ACF and the Community Foundation Network), **intermediaries** (eg, Philanthropy UK and NPC) and **academic initiatives** (eg, Cass Business School and the Third Sector Research Centre).

At present, however, existing infrastructure is relatively thin and under-resourced, and there are few archives or searchable databases that are regularly updated. As a result, those in search of information need to trawl numerous funder websites, be signed up to each individual newsletter and check each blog. Even then, it is not always clear who is doing what. One report states: *‘There is a flood of isolated monologues and a trickle of engaging conversations’*.<sup>xxix</sup>

Many funders recognise the vital role that ACF provides for its members in navigating this difficult landscape and signposting funders to the right contacts. Indeed, one regional funder pointed out that *‘without ACF you wouldn’t know where to start’*. However, some smaller funders and new philanthropists are not well connected to existing networks and resources.

Audiences that could benefit from the knowledge that funders have—other funders, charities, practitioners, policy-makers—often do not know to ask for it, or do not know whom to approach. Smaller or regional funders in particular can feel excluded by resources or geography, and may lack a voice at conferences and forums with larger funders. This is significant because it is these isolated organisations that may have most to gain from the knowledge of larger and more established funders (and plenty to offer in return).

New technologies may provide opportunities for improving the infrastructure, and funders have expressed interest in exploring this area. However, it is necessary to understand

whether the audience for this information would use such technologies. At present, the few discussion boards and online forums that exist are not used widely enough to sustain interest. Those resources that do exist may require dedicated staff to moderate and update users, and generate interest, however, this adds to the cost.

The section below outlines some recent initiatives to build the infrastructure for learning and knowledge-sharing from the UK and elsewhere. Finally, we present some recommendations for what could be done to improve current practice.

## Interesting initiatives

In the US, **Glasspockets** website links foundations’ annual reports, grant-making policies and other useful documents, and contains a customised Google search that allows the user to search foundation websites for information on specific topics, for example, homelessness. This is a useful mechanism to improve the sharing of knowledge among funders.

**PhilanthropySearch.org** scans the websites of the 100 largest foundations in America, philanthropy consulting firms, university research centres, and other sites about philanthropy.

**PubHub**, a project of the Foundation Center, and **IssueLab** aggregate publicly available research about nonprofit organisations. PubHub focuses on foundation-financed research, while IssueLab is an open source archive of research produced by charities, university-based research centres, and foundations, tracking research across thirty-four social issue areas.

The **Johns Hopkins Center for Civil Society Studies** has created a network of approximately 1,000 nonprofit organisations that have agreed to serve as organisational **‘listening posts’** to explore challenges facing the sector. The overall goal is to speed the generation and diffusion of practice-relevant knowledge.

‘There is a flood of isolated monologues and a trickle of engaging conversations.’

Glasspockets allows users to search foundation websites for information on specific topics.

Up until now there has been no central repository for publications relating to the third sector.

In the UK, **Funderzone** (part of the Funding Central website sponsored by the Cabinet Office and managed by NCVO) provides a space for grant-makers, public sector commissioners and loan providers to share best practice and further information about grant programmes, contract tenders and loan schemes. It enables funders to view activity on Funding Central that relates to their programmes, add information about their funding opportunities, share information and advice about programmes, view user comments and promote events.

The **Third Sector Research Centre (TSRC)** has recently been funded by the Big Lottery Fund, to collaborate with the British Library in establishing a permanent collection of published material on and for the third sector. Up until now there has been no central repository for publications relating to the third sector and, as a result, researchers and other users have found it difficult to trace relevant material. Establishing a common resource bank as part of the British Library's social sciences collection will enable better cumulative use of existing research and 'grey' literature.

In Europe, the **European Foundation Centre** has around 160 independent funder members. Its Philanthropy Network Project aims to develop relationships among national associations of foundations in Europe. Across Europe, there are some 17 distinct national associations serving foundations, and a number of new 'donors forums' in Central and Eastern Europe. Its **Funders Online** initiative aims to promote the use of internet technology among independent funders in Europe and to create a single point of reference to Europe's philanthropic community. Its website features the first internet directory of independent funder websites, where users can access the websites of more than 300 funders in Europe.

Supported by **City Bridge Trust** and other funders, ACF and NPC are running a simple pilot website for six months to share knowledge between foundations. It will contain funder-specific search tools, a Q&A space, and a forum for topical issues. The aim is to see if there is sufficient demand and whether a user base can be built. ACF and NPC are convening a group of funders to be part of this pilot, and would like to invite readers to participate—whether contributing resources, ideas or signing up to use the website.

#### Box 12: The Knowledge Centre

The Nominet Trust was created in 2008 and gives grants to internet-related projects in the areas of education, online safety and inclusion. Its initial funding has come from Nominet, which maintains the .uk register of domain names and is one of the world's largest internet registries.

The Nominet Trust is in the process of launching a 'Knowledge Centre', a website that will publish online evaluations about its grantees and other charities. It has developed a short evaluation form (to be filled in by charities), which is designed to present information in a simple, standardised way that other charities will find useful, and will be able to learn from. It will contain information on lessons that charities have learnt and what has and has not worked, to encourage transparency and learning from one another's projects. In time, the Trust plans that more and more charities will complete this evaluation form so that the Knowledge Centre can become an accessible repository of information on what works and what is being done.

The Knowledge Centre will have a search engine and a database that can be searched by filtering for projects by geography, size and project type. The software will be open source so that anyone can learn from it and replicate it if they want to. Any organisation will be able to download all the data from the evaluation forms into Excel so that they can manipulate and analyse it to draw out lessons. The whole project is designed to improve access to useful information and encourage greater openness and opportunities for knowledge-sharing. The Trust reports that the site will cost around £30,000.

The idea came about partly due to the Trust's ethos of opening up access to information, but also through the experience of one staff member who had previously worked as a fundraiser in a small charity. He had witnessed the frustration of charities in finding out what different funders were doing, what they would fund and what lessons could be learnt from other charities (both to improve and to make sensible funding applications). He realised that *'funders are sitting on a lot of useful information for which there is a genuine demand'*, and that this lack of access and transparency was leading to huge duplication and wasted resources (by both charities and funders), and poor collaboration among charities working in the same field.

Funders are sitting on a lot of useful information for which there is a genuine demand.

## Recommendations for the sector

Whilst there is much that individual organisations can do to improve their own learning and knowledge-sharing (see Recommendations for Funders on page 16), their efforts can be facilitated by resources and infrastructure for the sector as a whole. ACF is well-placed to lead this, however, without additional support, it is difficult to test interest and develop effective resources.

**Funder networks should test demand among their members.** There is relatively little ‘market research’ on the needs of funders or other audiences—for what information they might use and how they would like to access it. For example, there may be an opportunity to improve knowledge-sharing with funders who do not have easy access to networks and forums, and therefore find it difficult to identify information sources and access tacit knowledge. Building an understanding of this, and exploring different possibilities for knowledge-sharing, could add value to the wider sector.

**ACF should host centralised resources.** A central website, to which individual funders could link and feed their material, would attract a higher level of traffic than individual websites and improve the efficiency of gathering information. This would need to be an easily accessible, regularly updated and could include search tools. ACF and other bodies have tried some elements of this, however, additional resources may be required to test demand, update material and drive interest. A pilot website is planned to test this (see above). A site could include:

**(1) A repository of research reports and evaluations.** Funders highlighted that it would be useful to have a central place where charities, funders and other audiences could go to view research and evaluations.

**(2) A single space where all funder blogs and newsletters could be viewed.** There is not currently enough regularly updated blog content on each individual website to attract high numbers of users. Instead, blog content could be fed to a single centralised website on which all blogs and e-newsletters could be viewed.

**(3) A directory of who is doing what.** Many funders said that they would like a centralised list where they could look to see who was funding what, who has a programme in which area, and which individuals you would need to contact. There is also some demand for a mailing list of funder CEOs. One foundation CEO pointed out that this is a very helpful way to identify useful sources of knowledge very quickly and easily.

**(4) A foundation search tool.** NPC estimates that it would cost under £10,000 to develop and market a search engine that searches trust and foundation websites. This would enable users to search all trust and foundation websites, or specific sub-sections such as publications or grant criteria.

**Leading funders could pool knowledge-sharing resources.** A knowledge-sharing post, jointly funded by a number of foundations, could be dedicated to extracting explicit knowledge from foundations, making it available through a central resource, and publicising it and encouraging its use. This could be more efficient than many foundations doing this in a fragmented way. Some resources could also be dedicated to reaching out to other funders—for instance smaller, regional or newer ones.

**ACF or regional funders should help provide opportunities for grants officers.** Grants officers need opportunities to share information and learn from peers in other organisations. At present, most networking occurs at a relatively senior level. However, examples where grants officers have been able to get together or conduct exchanges are reported to have been very successful for drawing out and sharing tacit knowledge.

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# Other NPC publications

## NPC's published research

Research reports are focused on specific areas of charitable activity in the UK unless otherwise stated.

### Community

- **Trial and error:** *Children and young people in trouble with the law (2010)*
- **Breaking the cycle:** *Charities working with people in prison and on release (2009)*
- **Short changed:** *Financial exclusion (2008)*
- **Lost property:** *Tackling homelessness in the UK (2008)*
- **Hard knock life:** *Violence against women (2008)*
- **When I'm 65:** *Ageing in 21<sup>st</sup> century Britain (2008)*
- **Not seen and not heard:** *Child abuse (2007)*
- **A long way to go:** *Young refugees and asylum seekers in the UK (2007)*
- **Home truths:** *Adult refugees and asylum seekers (2006)*
- **Inside and out:** *People in prison and life after release (2005)*
- **Grey matters:** *Growing older in deprived areas (2004)*
- **Side by side:** *Young people in divided communities (2004)*
- **Local action changing lives:** *Community organisations tackling poverty and social exclusion (2004)*
- **Charity begins at home:** *Domestic violence (2003)*

### Education

- **Count me in:** *Improving numeracy in England (2010)*
- **Getting back on track:** *Helping young people not in education, employment or training in England (2009)*
- **Inspiring Scotland:** *14:19 Fund (2008)*
- **After the bell:** *Out of school hours activities for children and young people (2007)*
- **Lean on me:** *Mentoring for young people at risk (2007)*
- **Misspent youth:** *The costs of truancy and exclusion (2007)*
- **Read on:** *Literacy skills of young people (2007)*
- **On your marks:** *Young people in education (2006)*
- **What next?:** *Careers education and guidance for young people (2005)*
- **School's out?:** *Truancy and exclusion (2005)*
- **Making sense of SEN:** *Special educational needs (2004)*

### Health and disability

- **Rights of passage:** *Supporting disabled young people through the transition to adulthood (2009)*
- **Heads up:** *Mental health of children and young people (2008)*
- **A life less ordinary:** *People with autism (2007)*
- **What price an ordinary life?** *Financial costs and benefits of supporting disabled children and their families (2007)*
- **Don't mind me:** *Adults with mental health problems (2006)*
- **Valuing short lives:** *Children with terminal conditions (2005)*
- **Ordinary lives:** *Disabled children and their families (2005)*
- **Out of the shadows:** *HIV/AIDS in Burundi, Democratic Republic of Congo and Rwanda (2005)*
- **The hidden assassin:** *Cancer in the UK (2004)*
- **Caring about dying:** *Palliative care and support for the terminally ill (2004)*
- **Rhetoric to action:** *HIV/AIDS in South Africa (2003)*

### Environment

- **Green philanthropy:** *Funding charity solutions to environment problems (2007)*

### International

- **Giving in India:** *A guide for funders and charities (2009)*
- **Starting strong:** *Early childhood development in India (2009)*
- **Philanthropists without borders:** *Supporting charities in developing countries (2008)*
- **Going global:** *A review of international development funding by UK trusts and foundations (2007)*

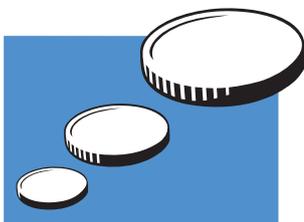
### Improving the charity sector

- **NPC perspectives:** *Proving your worth to Whitehall (2010)*
- **Trusteeship 2010:** *An update for charity trustees (2010)*
- **New facilities, new funding:** *A proposed financing model from Scope (2010)*
- **NPC perspectives:** *Scaling up for the Big Society (2010)*
- **Social return on investment (SROI) position paper (2010)**
- **Well informed:** *Charities and commissioners on results reporting, A National Performance Programme report for charities, funders and support providers (2010)*
- **The business of philanthropy:** *Building the philanthropy advice market (2010)*
- **The little blue book:** *NPC's guide to analysing charities, for charities and funders (2010)*
- **Targeting support:** *Needs of groups helped by the Bankers Benevolent Fund (2009)*
- **Achieving more together:** *Foundations and new philanthropists (2009)*
- *What place for mergers between charities? (2009)*
- **Board matters:** *A review of charity trusteeship in the UK (2009)*
- **Granting success:** *Lessons for funders and charities (2009)*
- **More advice needed:** *The role of wealth advisors in offering philanthropy services to high-net-worth clients (2008)*
- **Advice needed:** *The opportunities and challenges in philanthropy for ultra high net worth individuals and family offices (2007)*
- **Trading for the future:** *A five-year review of the work of the Execution Charitable Trust and New Philanthropy Capital (2007)*
- **Striking a chord:** *Using music to change lives (2006)*
- **Just the ticket:** *Understanding charity fundraising events (2003)*

### Tools

- **Everyday cares:** *Daily centres in Italy and the UK (2009)*
- **Feelings count:** *Measuring children's subjective well-being for charities and funders (2009)*
- **How are you getting on?** *Charities and funders on communicating results (2009)*
- **On the bright side:** *Developing a questionnaire for charities to measure children's well-being (2008)*
- **Critical masses:** *Social campaigning (2008)*
- **Turning the tables:** *Putting English charities in control of reporting (2008)*
- **Turning the tables:** *Putting Scottish charities in control of reporting (2008)*
- **Valuing potential:** *An SROI analysis on Columba 1400 (2008)*
- **Funding success:** *NPC's approach to analysing charities (2005)*
- **Full cost recovery:** *A guide and toolkit on cost allocation (2004, published by NPC and acevo)*
- **Surer Funding:** *Improving government funding of the voluntary sector (2004, published by acevo)*
- **Funding our future II:** *A manual to understand and allocate costs (2002, published by acevo)*

NPC's research reports and summaries are available to download free from [www.philanthropycapital.org](http://www.philanthropycapital.org).



# New Philanthropy Capital

New Philanthropy Capital (NPC) is a consultancy and think tank dedicated to helping funders and charities to achieve a greater impact.

We provide independent research, tools and advice for funders and charities, and shape the debate about what makes charities effective.

We have an ambitious vision: to create a world in which charities and their funders are as effective as possible in improving people's lives and creating lasting change for the better.

- For charities, this means focusing on activities that achieve a real difference, using evidence of results to improve performance, making good use of resources, and being ambitious to solve problems. This requires high-quality leadership and staff, and good financial management.
- For funders, this means understanding what makes charities effective and supporting their endeavours to become effective. It includes using evidence of charities' results to make funding decisions and to measure their own impact.

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## New Philanthropy Capital

3 Downstream 1 London Bridge London SE1 9BG

t: +44 (0)20 7785 6300 f: +44 (0)20 7785 6301

w: [www.philanthropycapital.org](http://www.philanthropycapital.org) e: [info@philanthropycapital.org](mailto:info@philanthropycapital.org)

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