

JOSEPH ROWNTREE CHARITABLE TRUST

## Converting the vision into a strategy **Stephen Pittam**

Promoting social justice is in the DNA of the Joseph Rowntree Charitable Trust (JRCT). Almost 150 years ago our founder, Joseph Rowntree, wrote tellingly about his worries about philanthropy:

*Charity as ordinarily practiced, the charity of endowment, the charity of emotion, the charity which takes the place of justice, creates much of the misery it relieves, but does not relieve all the misery it creates.*

Thankfully this did not stop him endowing three foundations in 1904, of which JRCT is one. It did make him want to do things better.



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Two key themes run through the Memorandum that he wrote on setting up the trusts which continue to influence the way in which we convert the vision of a more just and peaceful world into the reality of our grantmaking strategies. In some ways the two run counter to each other, but holding them in balance is an important part of how we operate. I have felt myself wrestling with the creative tension that they produce as I have been thinking about this article.

On the one hand, Rowntree encouraged us to think carefully about what we do. His view was that if philanthropy was wisely directed it could 'change the face of England' in a matter of years. He felt much of the philanthropy he saw was directed at remedying superficial manifestations of problems. He described how in his day the Soup Kitchen in York never had difficulty in obtaining adequate funding whereas an inquiry into the extent and causes of poverty would have enlisted little support. He encouraged trustees to focus their resources on the underlying causes. This thinking leads us into making sure we have a rigorous analysis of the injustices that we are addressing, and can articulate a clear direction for where we are going.

On the other hand, Rowntree knew that he didn't have all the answers. He wrote that there is often no better way of advancing the objectives he had set out than 'strengthening the hands' of those doing the work that needs to be done. He wanted to liberate people to follow their passion for addressing injustice. He recognized that an endowed fund could be effective in achieving change through being flexible, fleet of foot, and opportunistic in the best sense of that word. This thinking

leads us down the path of being responsive, not taking strategy to the point of inflexibility, and always being open to new ideas and new directions.

### Broadly defined programmes

So where does this lead us in terms of designing grantmaking strategies? We organize our work through three broadly defined programmes: Power and Responsibility (constitutional reform, democratic participation, human rights, corporate accountability), Racial Justice (tackling racism, empowering Black and Asian communities, migration/asylum policy, integration) and Peace (disarmament, conflict prevention, conflict resolution). Each programme has its own committee, comprising a core group of trustees plus outside experts. At each quarterly meeting we scan the external environment, learning from reports from current grantees as well as from the applications under consideration. We aim to be engaged and knowledgeable about the fields we work in.

Our strategy is then to frame the criteria for each programme in an open and broad way. We want to balance clarity about our interests with the message that we are open to be persuaded on the best strategies for achieving change. Our role is to use 'informed discernment' to determine where best to invest our resources.

### Being clear about our values

JRCT is interested in working for a more peaceful world, and for greater equality and social justice. We openly say so. In our guidelines we say that we are looking for opportunities to fund work which:

- ▶ is about removing problems through radical solutions, and not about making problems easier to live with;
- ▶ has a clear sense of objectives, and of how to achieve them;
- ▶ is innovative and imaginative *and where the grant has a good chance of making a difference.*

We are well networked and our messages reach out widely. Sometimes colleagues ask how we found a particular initiative. The answer is usually that the initiative found us. If you give out a message that you are interested in supporting risky and innovative work, your reputation for doing this will soon grow.

### Taking the long view and constantly adapting

One of the advantages of endowed foundations is that we can take the long view, which is often necessary to be effective in promoting social justice. We are not constrained by the short-termism that dominates our political and business systems. The campaigns for some

of the legislative changes that JRCT has supported have taken 10 to 20 years or even more. For long periods during those years there was little progress to show. Then a window of opportunity opened and the campaign was ready to make the difference. We supported the dedicated team at the Campaign for Freedom of Information for 15 years before the UK's Freedom of Information Act was passed and implemented, and we have continued to back the organization for a further five years to protect the legislation and make sure it is effectively used. We stood by this and other campaigns because we were as committed to the work as the organizations we were funding.

So, even while our overarching programmes have stayed the same, in some cases for 40 years, we are constantly adapting and changing in response to the wider environment and looking for the issues on which progress might come ten years down the line.

### Models of change

Our experience is that social change comes in ways more akin to a patchwork than a linear process. For this reason we find ourselves supporting a number of different models of change within each of our programmes. We will be funding both organizations operating on the 'inside' track, aiming to influence government policy and legislation, and those on the 'outside' track proposing more radical and visionary solutions. We support think-tanks and campaigning NGOs. We sometimes struggle to balance our own idealism with our recognition that pragmatism is often more effective than purity. But we have the luxury of being able to experiment with many different approaches.

Whatever the model of change, the relationship with those we support is critical. We acknowledge that there will always be a power differential between funder and funded but we try to reduce it as much as possible. Our aim is to foster a partnership. We are interested in 'power with' rather than 'power over'. We speak the language of liberation rather than control. If someone can persuade us of their vision, and that they have the capacity to deliver, then our role is to let them get on with the job, free from unnecessary constraints. Having faith in those we fund is part of our ethos. This is not to say that we are uncritical. We often see our role as that of a 'critical friend', challenging groups to stay focused on underlying causes and real change.

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### Making a difference

The key question we ask about any proposal is: will this make a difference? We are looking for a strong analysis of the issue and a clear set of objectives. But a logical and rational proposal is not enough. We are always looking for that extra 'nous' that suggests that the applicant has thought through the complexities of creating change. On a contentious issue like migration policy, for example, the task is not only to devise a rational and just policy but also to consider what has the chance of being adopted and surviving in the context of the prejudice that is being fermented by the tabloid press, the political pressure this creates, and the reflex that seems to impel politicians to respond by demonstrating toughness to the point of ruthlessness.

This is where we unashamedly use our intuition, honed through many years of experience of meeting with applicants and observing what has worked in what circumstances. At the end of the day it is usually our assessment of the calibre of the people involved that is the deciding factor on whether we take a risk. But taking risks is what we are about.

### Mainly responsive

We are primarily a responsive grantmaker. Our analysis is that few, if any, of the major pivotal changes in promoting social justice that have happened during the 106-year lifetime of JRCT have been initiated by a foundation. We see our role as supporting those who have 'fire in the belly' about affecting change. Our skills are in assessing a good idea, and whether those proposing change have the ability and know-how to make it happen. Our role is to support them and to use our experience to stand alongside them.

That is not to say that we never take our own proactive initiatives. We sometimes do when ideas emerge out of work that we have supported and those we fund persuade us that we are well placed to take action. But we ask ourselves very tough questions before embarking on such enterprises. We need to be as rigorous with ourselves as we are with those who apply for our funds.

### Powerhouse for change

We are interested in power and how it operates. We want to engage in the kind of philanthropy that supports real change and changes the power imbalances in society. Our image of ourselves as an institution is that of a powerhouse generating a supply of energy in support of those taking risks in order to tackle difficult and contentious issues. @

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