

John Ellerman Foundation

STRATEGY 2022-2025

Advancing wellbeing with 100% of our assets

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CHAIR'S FOREWORD

Against a backdrop of change and uncertainty, it is pleasing to have produced this three-year organisational strategy – our first in some time. The strategy sets a clear, ambitious public intention and commitment to all that engage with us in the coming years. It calls on us to deliver our organisational aim to advance the wellbeing of people, society and the natural world with 100% of our assets – namely our grantmaking, our investing, our values and our organisational competencies, capabilities and assets.

We developed this strategy through one-to-one and group conversations internally and externally, as well as commissioning feedback and research relating to our grantmaking. It builds on our learning gained from the last couple of years of working differently and exploring new ideas, under the leadership of our Director, Sufina Ahmad, who joined us in January 2020. This strategy is also informed by the conversations held within the charitable funding sector about what it means to be a modern and effective grantmaker.

Through this strategy we will focus our efforts on:

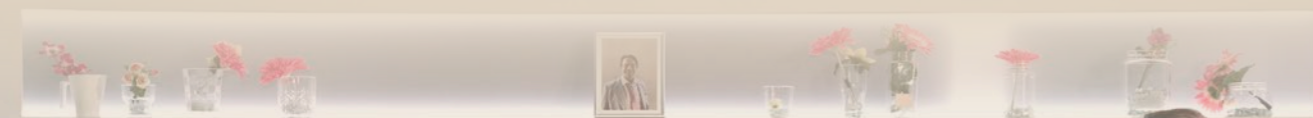
- our funding offer, ensuring that we embrace and deliver best and promising practice
- our investment policy, ensuring that we invest in ways that are aligned to our organisational aim, values and funding categories
- our work with others, ensuring that we understand our stakeholders and can work with them to deliver our work together more effectively
- our commitment to accountability, ensuring that we make further progress on diversity, equity and inclusion, transparency and impact and learning.

The next few years will be critical in responding to the global climate and nature crises, alongside the political, economic, cultural and societal challenges we face. John Ellerman Foundation believes that as an independent and endowed grantmaker we can support civil society to respond to these in a way that is transparent, accountable and effective.

We look forward to working with you all to deliver this strategy successfully.

Peter Kyle OBE

Chair, John Ellerman Foundation



Welsh National Opera

Madam Butterfly
© Richard Hubert Smith

Our Aim



To advance the wellbeing of people, society and the natural world.

The main ways in which we achieve this are by:

- 1 funding charities for work that has national significance in the fields of the arts, environment and social action (our funding categories). We believe these can make an important contribution to wellbeing; and
- 2 investing and managing our funds in such a way that balances the desire to maintain grantmaking capacity, operating in the long-term, and addressing the risk that our investments are poorly aligned to our aim and values.

Our values



- Responsive
- Discerning
- Flexible
- Personal touch
- Connected

Our funding categories



- Arts: *Creators and Curators*
- Environment: *People and Planet*
- Social Action: *Championing Change*

How we will deliver this strategy



Our funding offer

- Offer more ways of receiving pre-application advice
- Further refine our core funding offer
- Work more collaboratively
- Convene and connect organisations we fund
- Build in more time for learning and reflection
- Design a wider offer of support to those we fund

Our investment policy

- Work with our fund managers to ensure they invest in ways that will meet global targets relating to the climate and biodiversity crises
- Determine our approach to engagement or divestment
- Research and invest in more social and impact investing opportunities
- Review in more detail our decision to operate for 30 years only, thus closing in 2050

Our work with others

- Work in ways that are more outward facing
- Commit to understanding our stakeholders better
- Join funder collaborations because there is a mutual benefit and value to doing so

Our commitment to accountability

- Have clear and well understood approaches to diversity, equity and inclusion (DEI), transparency and accountability
- Develop a clear impact framework for our grantmaking
- Work in ways that are strategically responsive
- Report more fully on the progress we are making
- Be clear on why advancing wellbeing matters to us

What will success look like



This strategy sets out our ambitions to evolve and further refine our work in the next few years. It commits us more explicitly to taking a 'total assets approach' and being more 'strategically responsive', which means that we will focus our efforts across all our operations, not just our grantmaking, and offer more strategic leadership in some areas where it makes sense for us to do this. This strategy also signals our openness to feedback, engagement and continuous improvement.

INTRODUCTION

This is John Ellerman Foundation's first organisational strategy in some time. In 2021, we agreed that we would benefit from a three-year strategy document that outlines more clearly our purpose and ambitions as an organisation, and how we hope to deliver against these successfully.

This strategy takes what we have learned from the last few years, and considers the role that we can usefully play against a backdrop of a wide range of issues and opportunities impacting institutional philanthropy and civil society in the UK right now, including: the Covid-19 pandemic, disruption arising from Brexit, economic market uncertainty, the Government's Levelling Up agenda, the climate and biodiversity crises, political polarisation, loss of public trust in public, political and economic institutions, and systemic racism and inequities. However, we recognise that the economic, social and environmental impacts of these are far from fully determined or understood as yet.

Ultimately, this strategy is reflection of our belief that philanthropic organisations like ours have an essential role to play in using all our skills and assets to support progressive societal, economic and environmental change. We also recognise what a privilege it is to support the empowered and connected leadership across communities and ecosystems to deliver resilient, positive and ambitious change that advances our collective wellbeing.

The next three years will be important in consolidating the prototyping and learning we have been doing in the last few years, as well as ensuring that we remain open and responsive to the ideas being generated within philanthropy and wider civil society about what it means to be a modern and effective grantmaker. We hope that this strategy offers a clear insight into who we are as an organisation, what matters to us and why, and how we intend to deliver our strategic ambitions.

Scottish Ballet, 2019

With 2019 marking their 50th Anniversary, Scottish Ballet, Scotland's national dance company, Scottish Ballet sought new ways of reaching wider audiences via their digital season.

BACKGROUND

We are an independent grantmaking foundation committed to supporting work that makes a difference to people, society and the natural world

We were formed from a combination of the wealth and generosity of a father and son. Both were publicity-shy, and little is known about them. The first Sir John Ellerman (1862-1933) had built up from scratch an empire of shipping and other businesses in the early part of the 20th century. At the age of 23, his son, also called John, inherited his father's baronetcy and very considerable fortune. Although in charge of the family firm, the second Sir John's real interests lay elsewhere. He became a distinguished zoologist and world expert in the study of rodents. In 1971, two years before his death, he donated the funds from the Ellerman Lines business to form the original Foundation.

We are currently governed by a Scheme, approved by the Charity Commissioners for England and Wales in March 2002. The previous Scheme brought together the funds originally

donated in 1971, with a smaller trust fund set up under the first Sir John's will, and the Trustees were granted incorporation under the Charities Act 1993 as the Trustees of John Ellerman Foundation. The Scheme provides wide powers for the Trustees to carry out their duties.

2021 marked 50 years since our formation. We commemorated this milestone in a number of ways, shown below. These activities were delivered in partnership with colleagues from different organisations, and were designed to build upon aspects of our ongoing grantmaking activities where we felt we could offer further value to the wider grantmaking sector and the organisations that we fund. They were a very positive learning experience for us – demonstrating that even as a medium-sized grantmaker with six staff and nine Trustees in 2021 we can deliver work that is ambitious, outward-facing and well received externally.

2021 marked 50 years since our formation.

We commemorated this milestone in the following ways:

.....
Commissioning a research team to explore the origins of our endowment.
.....

.....
Launching the UK Overseas Territories Fund, which was a funder collaboration designed to support environmental work in the UK Overseas Territories.
.....

.....
An exploration of the role of lived, learned and practiced experience in eliciting social change through the Conference of Equals, which was designed and delivered by the Centre for Knowledge Equity and the Lived Experience Leaders network.
.....

.....
Protea – an international curatorial exchange programme between the UK and South Africa aimed at curators with at least five years of professional experience.
.....

.....
Gathering friends of the Foundation together for a social event, which included a panel discussion hosted by Dame Julia Unwin DBE that explored, amongst other things, the future of philanthropy, including the role of institutional grantmakers like us in eliciting social, economic and environmental progress.
.....

OUR AIM AND VALUES

Our aim

Our aim is to advance the wellbeing of people, society and the natural world. The main ways in which we achieve this are by:

1 Funding charities for work that has national significance in the fields of the arts, environment and social action (our funding categories). We believe these can make an important contribution to wellbeing.

2 Investing and managing our funds in such a way that balances the desire to maintain grantmaking capacity, operating in the long-term, and addressing the risk that our investments are poorly aligned to our aim and values.

Our values

Relationships are important to us across every aspect of our grantmaking, and in the ways in which we work with our peers and wider stakeholder networks to deliver our investing activities and our internal operations. Our values guide and reflect how we work.



Responsive

We are a **responsive** funder, listening and responding to what applicants and our wider stakeholder network judge is important.



Discerning

We have well-developed and regularly reviewed funding guidelines, enabling us to be **discerning** in our decisions about whom and what to support. This value also extends to the way in which we approach collaborative funding opportunities and make investment decisions relating to our endowment.



Personal touch

We value all our stakeholder relationships, including with organisations we fund and those applying to us, and seek to have a **personal touch**. Our Trustees are involved at every stage of a grant application, and we always meet an applicant before a grant is made.



Connected

We prefer to be **connected** and are in regular contact with relevant colleagues and partners in the charitable and investing worlds. We also like to keep in touch with organisations we fund, convening and connecting them with others from time to time.



Flexible

We are willing to be **flexible** and may venture outside our funding criteria or our usual ways of working, if we believe a different approach would be more effective.

WHY WELLBEING MATTERS TO US

Throughout the implementation of this strategy, we will be exploring in more detail why wellbeing matters to us. We know that wellbeing is a subjective concept that can mean a range of things to an individual, wider society and environmental ecosystems, and that it can relate to any number of interdependent economic, societal and environmental factors.

Philanthropy has the privilege of being able to support work that tries to address structural and systemic inequities and barriers that result in a loss or lack of wellbeing for people, society and the natural world. We demonstrate our commitment to advancing wellbeing in two ways – firstly through our grantmaking in support of the arts, social action and the environment, and secondly, our commitment to managing our endowment in a way that is well aligned to our organisational aim and values.



Ballet Black, 2016

Award-winning neo-classical ballet company performing *The Suiit*, a dramatic tale of 1920s New Orleans.

WHAT WE FUND

As a medium-sized and responsive grantmaker distributing circa £5.8m annually, we need to be discerning about what we can support, as demand for our funding exceeds our grantmaking budget. As a result of this, we prioritise supporting work delivered by UK-registered charities with an annual turnover of between £100,000 and £10,000,000, although we can and do make exceptions on this where feasible and necessary. We also seek to support organisations delivering nationally significant work that has as wide an impact as possible, and organisations that prioritise effectiveness and impact, partnership working and strong governance and management.

Our preference is to award core funding to organisations, but we can make grants for projects or programmes. Our core funding tends to support staff salaries, training and expenses, day-to-day running costs and operations, monitoring and evaluation, and communications and digital innovation. In a few instances, we also offer unrestricted core funding when all the work that an organisation undertakes fits with the relevant funding category guidelines.

The full details of what we will fund are available on our website and in our funding guidelines document. The information we share on our website and in our funding guidelines is reviewed on an ongoing basis, with a full review of the funding guidelines carried out at least once per year – usually in August and September. Our three funding categories and our aims for each of these are as follows:



Greenpeace
Tackling plastic pollution

Arts

Creators and Curators

We believe arts and culture have the potential to enrich and transform lives, and we recognise its inherent value and unique effects. We will fund organisations that nurture, incubate and commission those people who make and curate work.



Beamish, the Living Museum of the North



National Museum Wales



SICK! Festival – Daughters of the Curry Revolution © Tamsin Drury



Ballet Black: Dream

Environment

People and Planet

We believe that a healthy environment is essential to the wellbeing and resilience of people and nature. Our aim is to achieve greater harmony between people and nature, through the protection, restoration and sustainable use of the natural world. We are interested in organisations that understand the interdependence of people and nature and apply this in their thinking and practice. Often, it is the system that has to change, so we will also support those working to influence governments, businesses, financial and economic systems, and civil society through policy, advocacy and campaigning work.



Falklands Conservation tussac planting



Wildlife and Countryside Link © Paul Naylor



Ascension Island © Jude Brown



Greenpeace

Social Action:

Championing Change



Surviving Economic Abuse

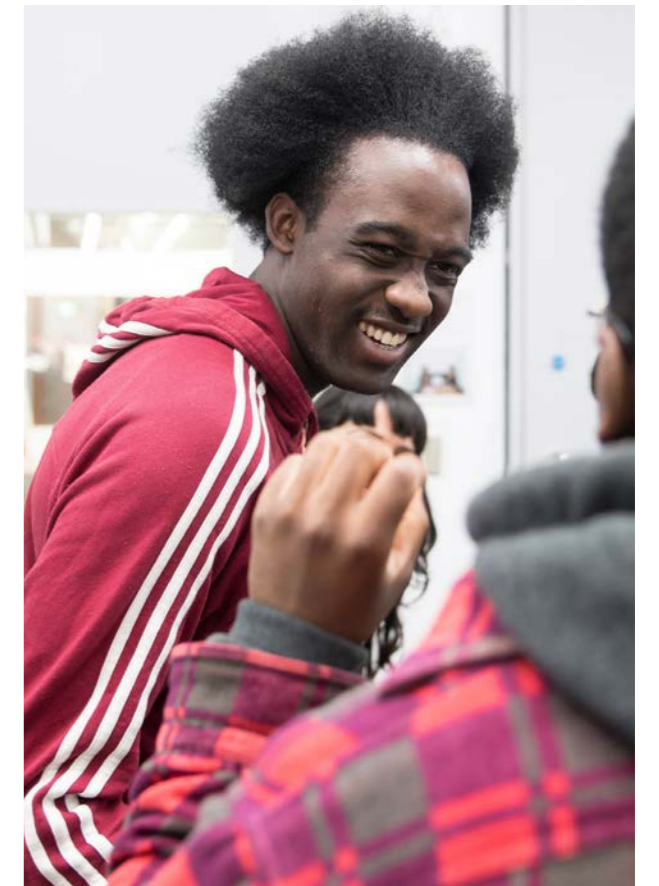


Heart n Soul

We aim to help create an inclusive society where all can thrive, by supporting organisations which work to create positive changes at a systems-wide level benefitting wider society. We believe it is people working together who create change. We are interested in organisations with a track record that tackle divisions and inequity, and who bring together individuals, community organisations and others, including national bodies, to influence government and the agencies that shape our lives.



Who Cares Scotland



Resourcing Racial Justice

OUR INVESTMENT POLICY

In 2020 we developed our new Investment Policy, which we published externally to our website for the first time. We continue to discuss and evolve the Policy with others through speaking engagements, blogs on our websites, articles for other relevant publications, and our membership of CRIN (the Charities Responsible Investment Network, convened by ShareAction) and FIRM (the Finance Investment and Resources Management group, convened by the Association of Charitable Foundations).

Our Policy presents a roadmap to doing good with 100% of our assets. Before 2020, our primary focus had been to manage the endowment in a way that prioritised financial returns, while balancing the desire to maintain our grantmaking capacity with operating in the long term. Through our new Policy we continue to spend approximately 4.5% of the value of the investment portfolio smoothed over three years, but we are also working hard to manage our endowment in a way that better supports our organisational aim. In practice, we describe this in our Investment Policy as wanting to:

.....
Reduce the risk that investment decisions made on our behalf support activities that are poorly aligned to our aims and values.
.....

Invest in a sustainable way i.e. to support long-term environmental and societal sustainability and to help address the climate and nature emergency.
.....

Be a responsible investor i.e. to take full account of environmental, social and governance (ESG) risks in our investment activities.
.....

Be transparent, accountable and effective.
.....

Work with the trust and foundations sector in **the transformation of systems and institutions** for managing endowments.
.....

Achieve the above in such a way that any **positive non-financial impact** from our investments exceeds any financial returns foregone to achieve them.

Since the Policy launched, we have been having robust Board-wide discussions about the ways in which we want to engage with our fund managers to ensure that the investments we make do not contradict the kind of work we support through our grantmaking. This is manifesting itself in conversations about investing in a way that meets the Paris Agreement targets of ‘a climate neutral world by mid-century’, or another way of putting it is Net Zero by 2050. There are plenty of evidence-based arguments showing that we need to reach Net Zero sooner than 2050, and that even if we do meet Net Zero we should also be striving for a carbon positive future. We are therefore very committed to working with our fund managers to think about what a net zero or carbon positive investment portfolio looks like, and the steps that need to be taken in order to achieve this. One thing we do know is that as single investor we remain more effective when joined with others, and so since 2021 we have been trialling different approaches to engaging in shareholder engagement work, with support from colleagues at CRIN and FIRM. The first trial relates to climate-related shareholder engagement activities, as there is robust evidence that climate change not only harms people and planet, it also reduces financial returns.

We are not yet in a position to state definitively what ethical and environmentally responsible investing means to us, and how we invest in ways that promote our organisational aim and our ability to make grants without undermining this work at the same time. However, we are undertaking much needed conversations internally

and with those we work with externally about this, and we are hopeful that by 2025 we will have a much clearer shared understanding on this.

Linked to our work on the Investment Policy, and our wider considerations of the environment, we replaced our Sustainability Policy with an Environmental Sustainability Policy in 2022. This Policy is publicly available and sets out our commitment to align our actions and intentions with our organisational aim, by seeking to be environmentally sustainable in all that we do, and to address and mitigate the environmental consequences of our activities, including our internal operations, procurement and governance, grants and investments

“ We are very committed to working with our fund managers to think about what a net zero or carbon positive investment portfolio looks like, and the steps that need to be taken in order to achieve this. ”

Bumblebee Conservation Trust

The only organisation in the UK committed to halting and reversing the decline of bumblebees.

IMPLEMENTING THIS STRATEGY

As an institutional grantmaker that has been operating for some time, we believe we have developed some core competencies and capabilities that we wish to leverage in delivering this strategy. These include things like effective grantmaking and investing, being led by our values, being open to working collaboratively and convening others around areas of shared interest, and a commitment to listening, learning and working transparently. To deliver this strategy we will harness these things and direct them towards the following:

I Our funding offer

We are committed to seeking feedback on our grantmaking processes and considering best and promising practice within grantmaking to enhance our own work. In 2020, we undertook a full review of our internal grantmaking processes, alongside commissioning nfpResearch to complete a perception audit on our behalf with successful and unsuccessful applicants. This resulted in us implementing improvements in the way we make grants, including by increasing the amount of pre-application advice we offer, offering clearer feedback on all unsuccessful applications and ensuring that our guidance and application timelines are clear and updated regularly.

In 2021, we commissioned nfpResearch to conduct research into the future of the grant funding sector, and contributed to other work on best and promising practice in grantmaking like IVAR's 'Why and how foundations give unrestricted funding', the 'Modern Grantmaking' movement and the Environmental Funders Network's 'Stories to Inspire' series. We also joined the #FixTheForm campaign and IVAR's Open and Trusting Pledge – further demonstrating our commitment to continuous improvement across our funding practice. We have also used the changes we made to our grantmaking as a result of the Covid-19 pandemic in 2020 and 2021 to review in more detail our approach to risk, and to offer more support to organisations we fund in the first year of their grant with us.

Over the next few years, we will develop our funding offer further, including our non-funding related support. This will include:

Offering a wider range of ways to access pre-application advice, including webinars and videos that address issues we commonly observe in applications to us.

Refining our core funding offer further, including undertaking formal annual reviews with our Board on whether we should be offering more unrestricted funding.

Continuing to work more collaboratively by joining or leading funding initiatives in support of causes we care about, including building on the learning from our 50th anniversary grantmaking activities and incorporating this in our main funding programmes.

Convening and connecting the organisations we fund with each other, and our wider networks, in order to help them achieve their strategic ambitions.

Building in more time to learn from and reflect on the grants we are making, and how we can use this learning to enhance our own practice and that of those we work with.

Designing and delivering a wider offer of support for those we fund; beyond the grants we offer.

2 Our investment policy

Our Investment Policy represents a significant way in which we seek to ensure that our funds are not invested in businesses and markets that contradict the work that we support through our grantmaking – especially in terms of our environmental work, specifically work relating to mitigating the impact of the climate and biodiversity crises. In the next few years we will:

Engage with our fund managers to ensure that they are investing on our behalf in ways that will meet global targets relating to the climate and biodiversity crises, including carbon net zero targets and the Sustainable Development Goals.

Consider our approach to engagement with, or divestment from, companies and markets that do not support our aim and grantmaking priorities.

Research and invest in more social and impact investing opportunities that are aligned to our organisational aim, and one or more of our funding categories. Social and impact investing represents a range of different approaches, from no sacrifice of financial return to no financial return, balanced by a compensating social benefit.

Consider more deeply the decision taken some years ago for the Foundation to no longer operate in perpetuity. This was reaffirmed in 2020, as part of our Investment Policy where we committed to make spending decisions that reflect the fact that we are committed to existing for another 30-years only. This is a decision that we will review every three years to ensure that we remain comfortable with this time horizon, with the first review scheduled for 2022.

“ We have used the changes we made to our grantmaking as a result of the Covid-19 pandemic in 2020 and 2021 to review in more detail our approach to risk, and to offer more support to organisations we fund in the first year of their grant with us ”



Bristol Old Vic, 2018

In *Oversong*, nine singers build a vibrant language of a cappella music and movement as they bring to life a series of compositions

3 Our work with others

As an organisation we want to be more outward-facing and engaged in work that supports our commitment to advancing wellbeing, our funding categories and the effective management of our endowment. This means gaining a deeper understanding of our stakeholders and our role within the independent grantmaking sector. For us, our stakeholders are any internal or external group or individual who can affect or is affected by the achievement of our objectives, and includes:

The organisations we fund.

The organisations applying to us for funding.

Sector membership bodies.

Peer funders and grantmakers.

Investors, including fund managers and social and impact investors.

Policymakers, including Government departments, think tanks and research agencies.

Media outlets.

Our staff, Trustees and the contractors we commission for specific pieces of work.

Over the next few years we will further refine how as a small team we can ensure that we are interacting with the relevant individuals and organisations within these stakeholder groupings to deliver our work more effectively. This will mean building on the networks and connections we have already established, as well as seeking out new stakeholders that will support us to make a positive difference.

As part of working with others, we are open to joining or leading funder collaborations too. A range of different types of funder collaborations exist, such as learning networks, strategic alignment networks and pooled funds.

We understand that these offer us an opportunity to work with others to:

Support ideas and challenges that are too large for any single institution to have any chance of affecting, let alone resolving.

Gain valuable new knowledge and make better choices.

Make things easier for applicants who can for example in the case of pooled funds write a single funding proposal and then receive grants from several organisations.

When determining whether we should join a funder collaboration we will do so in a way that ensures we feel there is mutual benefit and value to our being involved. We will take decisions to join a funder collaboration in a way that ensures the team, Board and those we work with can discern clearly the reasons for our involvement.

4 Our commitment to accountability

This involves a greater commitment by us to diversity, equity and inclusion (DEI), transparency and impact and learning, and to sharing our progress in these three areas more publicly.

Like many of our peers, we recognise that the failure to prioritise and improve DEI practices within institutional philanthropy and the wider charity and philanthropic sectors has led to the inequitable distribution of funding. As a sector, this failure manifests itself primarily through our non-diverse staff teams and Boards, and the ways in which our funding practices, processes and cultures disproportionately disadvantage marginalised groups – the very groups we seek to support through our funding in the first place.

In January 2021, we approved our first DEI Accountability Plan. This builds on our previous thinking and work, including through our support of Resourcing Racial Justice, and it

includes the insights and learning on race, social justice and DEI more widely shared by our membership bodies, the Association of Charitable Funders, the Environmental Funders Network and London Funders.

Our DEI Accountability Plan is the joint responsibility of the Director and the Board (which includes a lead Trustee on DEI) and is under continuous review, with the Board asked to approve the next phase of our work at least once a year. The Plan aims to deliver greater equity and improved funding practices through developing and embedding a shared organisation-wide understanding of DEI and applying this throughout our operations. This includes: the management of our underlying endowment; our grantmaking; the recruitment, retention and progression of our staff and Trustees; our internal and external communications; and research into the derivation of our wealth.

“The Plan aims to deliver greater equity and improved funding practices through developing and embedding a shared organisation-wide understanding of DEI and applying this throughout our operations”

Blue Marine Foundation

Lyme Bay is a BLUE flagship project, proving that sustainable fishing can co-exist with conservation.

IMPLEMENTING THIS STRATEGY

We are also dedicated to operating with more transparency across all our operations, be that through the publication of our grants data to 360Giving, or through our increased attendance and participation in external events and discussions panels, or by sharing blogs, research and organisational policies externally and on our own website, or by supporting the Foundation Practice Rating initiative commissioned by fellow funder the Friends Provident Foundation. In 2021 we launched a research project into the origins of our wealth, in terms of the business and philanthropic histories of the second Sir John Ellerman, his father and his sister. We intend to share the findings of this work publicly too.

In 2020, we also developed a new approach for categorising our grants and applications, followed by the introduction of the DEI Data Standard in our grantmaking processes in 2022. This work allows us to discern geographic and thematic clusters of grants that are forming within our grants portfolio and consider how we may be able to support these more strategically. It also means that we can identify any trends in the types of organisations that apply to us successfully and unsuccessfully. This allows us to determine unrealised biases or issues within our processes that result in certain groups being rejected more often, which is important to understand in our commitment to DEI.

To-date, our impact and learning has been shared through our Annual Report mainly, and occasional publications relating to work that falls outside of our day-to-day work, like our Museums and Galleries Fund or our Perception Audit with successful and unsuccessful grant applicants.

“ We are dedicated to operating with more transparency across all our operations, be that through the publication of our grants data to 360Giving, or through our increased attendance and participation in external events and discussions panels. ”

In the next few years we will prioritise the following in relation to our impact and learning work:

.....
Developing a clear impact framework through which we can discern the impact of our grants, which will be shared internally and externally and inform our future grantmaking. This would include things like demonstrating how we can determine if we are achieving the aims set out for each of our funding categories.

.....
Considering specific areas of learning where we can be more ‘strategically responsive’. This means seeking out opportunities to respond to ideas and opportunities where we feel we could add value and make a real strategic difference that benefits our wider stakeholder networks. As a small organisation, we will focus our efforts initially on some of the more unique work we fund through our grantmaking work, such as the work in our social action category to fund policy advocacy and campaigning work that actively involves those with personal experience of the issues tackled, or curatorial work in museums and galleries, or environmental work in the UK Overseas Territories.

.....
Reporting more fully and externally on our progress across other key areas of our work, such as our investment policy and research into the origins of our wealth.

.....
Having a clearer understanding of why advancing wellbeing matters to us.

WHAT WILL SUCCESS LOOK LIKE

This strategy sets out our ambitions to evolve and further refine our work in the next few years. It commits us more explicitly to taking a ‘total assets approach’ and being more ‘strategically responsive’, which means that we will focus our efforts across our operations, not just our grantmaking, and offer more strategic leadership in some areas where it makes sense for us to do this. This strategy also signals our openness to feedback, engagement and continuous improvement.

In the next few years, we believe that the success of this strategy will be demonstrated in the following ways:

.....
Having a team and Board that is small, effective and empowered.

.....
Working more collaboratively with stakeholders and networks to advance wellbeing.

.....
Taking a values-led approach, with a meaningful and a widely understood approach to DEI, transparency and accountability.

.....
Delivering a grantmaking offer that is effective, regularly reviewed and continuously improved to meet the needs of our applicants and the organisations that we fund.

.....
Investing in a way that means we can still make grants for the next 30 years, whilst also figuring out ways in which we can ensure that our investment decisions do not contradict the work that we are supporting through our grantmaking.

.....
Committing to learning and impact measurement frameworks that better demonstrate the difference our work and approach are having, and why advancing wellbeing matters to us.

Greenpeace

The Great British Oceans Project is seeking a concerted, holistic approach to counter various threats to the United Kingdom Overseas Territories, home to an extraordinary range of biodiversity.



CONCLUSION

Philanthropy, and institutional grantmaking, has experienced numerous reincarnations and critical reflections during its long lifetime. Philanthropy can be criticised as being a plaything of the privileged, wealthy and elite, derived from ill-gotten gains, misused as a way of sanitising public profiles, and often misdirected to unworthy causes or used in ways that accept and rarely challenge the systemic and underlying root causes of the activities being supported. Some would cite the fact that in 2022 the levels of societal injustice and environmental degradation remain all too visible, with initiatives like Agenda 2030 and the Sustainable Development Goals championing global action in response to these inequities, as evidence to qualify this perception of philanthropy as sustaining social orders, and behaving in ways that are cautious, conservative and reactive.

However, we know that with our power, independence and ability to deliver over the long-term we have supported work that challenges both the symptoms and root causes of systemic and structural issues, and improves politics, society, the economy and the environment in ways that have enhanced the lives of individuals and communities across the UK and beyond. This strategy ensures that we will continue to do this and more in the coming years.

In 2019 and 2020, the Association of Charitable Foundation produced eight reports as part of its Stronger Foundations project, which aims to help grantmaking organisations identify and pursue ambitious practice in relation to the following six pillars:

.....
Diversity, Equity and Inclusion (DEI)
.....

Impact and Learning
.....

Strategy and Governance
.....

Transparency and Engagement
.....

Investment
.....

Funding Practices.
.....

This strategy considers these pillars, alongside our own learning and the wider perceptions of philanthropy, and reasserts our commitment to being a modern and relevant grantmaker. A grantmaker that operates in a well-informed, empowered and humble way to advance the wellbeing of people, society and the natural world. We look forward to sharing our progress with you.



This strategy was compiled on behalf of John Ellerman Foundation by our Director, Sufina Ahmad MBE.

John Ellerman Foundation

Registered Charity Number 263207

www.ellerman.org.uk