PUNCHING ABOVE OUR WEIGHT
Fostering social change as a small foundation

November 2018
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WHAT IS THE IMPACT INCUBATOR?

The Impact Incubator is a collaboration between charitable foundations and Social Finance.

It exists to incubate transformative models of social change that improve people’s lives.
WHAT HAVE WE DEVELOPED SO FAR?

- DRIVE
- black thrive
- LEAVING WELL
- RESET
HOW DO WE WORK WITH FOUNDATIONS?

- Partnership
  - Collective decision making
  - Share the journey of change
  - Transparent about learnings
  - Leveraging philanthropic funds
  - Common reporting
  - Building wider collaborations
  - Regular steering committee meetings
  - Sharing research
HOW DOES TREEBEARD WORK?

- Collaboration
- Collective responsibility
- People and leaders
- Draw in expertise
- Bounds of capacity
- Innovation & opportunity
- Accountability
- System or individual?
- Trustees

Reflections
WHY DID TREEBEARD CHOOSE TO WORK WITH SOCIAL FINANCE’S IMPACT INCUBATOR?

Why SF II?

- People
- Funder role
- Pace of learning
- Access
- Network strength and influence
- Collaboration
- Cross sector
- Theory of change around scale
EXERCISE 1: YOUR ROLE AND VISION

1. What is your focus?
   - Improving the system
   - Addressing specific social issues
   - Resourcing civil society

2. What role do you want to play?
   - Lead from foundation
     - Responsive
     - Proactive
   - Degree of collaboration
     - In Partnership
     - Independent

3. What is your vision?
   How does the world look in 20 years?
   What has your role been in effecting that change?
Our mission is to support transformational initiatives which have the potential to create a fairer society.

We believe that society is broken and that the only way of fixing it is through a radical overhaul of old models – of philanthropy, of business and of public life.

At Treebeard we aim to identify partners who are seeking to achieve strategic, lasting and system level change in a range of focus areas.
WORKING WITH SMALL FOUNDATIONS

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<th>Benefits</th>
<th>Constraints</th>
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<td>Speed of decision-making</td>
<td>Capacity</td>
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<td>Flexibility to pay a role no other money is able to play</td>
<td>Concerns of asymmetry of power or contribution in contrast to larger foundations</td>
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<td>Passion/ vision</td>
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<td>Expertise</td>
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- Build **deep long term partnerships based on trust** which draw on what each partner can contribute
- Provide the foundation with the **knowledge and insights** you have gleaned to make everyone more efficient
- **Common reporting frameworks** that reduce administrative burden on both sides
- Recognise that the **contribution** from a foundation is **way beyond the money**
Start with a shared mission and an agreed strategy

Larger funders and programme leads

Sector experts – NPC etc

Engage with co-funders

Ask potential grantees the right questions

Clarify your role as a funder and consider what you will gain

Bigger picture rather than £ by £

Dialogue and relationships over paperwork (in line with agreed processes)

Be in it for the long term

Two steps forward, one step back

Practical tips from the room?
**EXERCISE 2: LEVERAGING YOUR STRENGTHS FOR IMPACT**

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<tr>
<th>Barrier</th>
<th>What are the barriers to achieving your vision?</th>
<th>Could you address this?</th>
<th>How?</th>
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