



FROM A TO B PODCAST

From A to B Podcast: Audio Transcript Episode 1: 'Fundraising' with Ushi Bagga & Lucy Beevor

AB: Adam Bradley, Arts & Business NI
UB: Ushi Bagga, Paul Hamlyn Foundation
LB: Lucy Beevor, Fundraiser

AB: This is 'From A to B': Conversational snapshots of the journey toward sustainability.

My name is Adam Bradley, and I'm the Arts Programme Co-ordinator at Arts & Business Northern Ireland, where we champion a more sustainable future for the Arts Sector in NI by supporting organisations with fundraising, strategic development, partnership and governance. This fortnightly summer series of four podcasts will give artists and arts professionals the opportunity to be the proverbial fly on the wall to discussions between sector leaders about organisational growth, fundraising, adapting to change and corporate partnership, to inspire and equip the sector with ideas on how to become stronger and more resilient.

This second episode focuses on Fundraising, and features Ushi Bagga, Head of Arts Programme at Paul Hamlyn Foundation, one of the UK's leading charitable funders in the Arts, and Lucy Beevor, a fundraiser working with NI cultural organisations with a vast amount of experience in arts fundraising across the UK. We have worked closely with both Ushi and Lucy over the last few years, and I'm thrilled to bring them together for a conversation on arts funding in Northern Ireland.

LB: Hello, I'm Lucy Beevor. I'm a fundraiser for arts charities and I live and work in Belfast. I'm sitting in a recording studio on the edge of Belfast Lough, and I'm really looking forward to discussing the ins and outs of funding for arts charities with Ushi Bagga, who works for one of the UK's most generous funders of the Arts: the Paul Hamlyn Foundation.

UB: Thank you, Lucy, for that lovely introduction. Yes, so I am Ushi Bagga and my role within the Paul Hamlyn Foundation is to head up one of the programmes which is around the arts. Mainly focused on *Arts Access & Participation*. At the moment, I'm working from home this morning, so I am at home in South London, and really looking forward to this conversation.

LB: Thank you, Ushi. Well, do you want to start with a bit about Paul Hamlyn Foundation? Tell us a bit about maybe some of the fundamentals at the heart of what you do.



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UB: Yeah, absolutely. So we are a charitable Foundation established in 1987 by Paul Hamlyn. He was an entrepreneurial publisher and philanthropist, and the mission of the foundation is to support social change. So, in terms of our overall scale: in 21/22, we received around 2,000 applications across the whole of the foundation in all of its programmes. We made almost 500 grants and that was a total of £38 million spent. So the Foundation has grown and developed over the years since it's been founded, and we're always questioning and learning and trying to do things in better way. I think it's really important that we recognise that there's a lot of change that we need to make as a foundation, and that we are in a process of evaluation, always thinking about how we could do things better. We do a lot of funding in the arts, but we absolutely don't consider ourselves to be the experts. We are always on that learning journey. At the moment that's very much the case within our most recent strategy, and it speaks even more clearly about social justice and the need to address systemic inequality. And so we're really asking ourselves some very very important questions at the moment about what change we need to make to become a more inclusive funder, how to be an anti-racist funder, and what does it mean to have equity in our lives?

LB: That really resonates, perhaps with many parts of the UK as well, Ushi, and I think you talked a bit about how some of that questioning and learning that you've been going through as an organisation is also beginning to shape some of the ways you give money out as well. To whom as well. And that you've seen some interesting change, I think, around the last year and a half or so in the types of organisations that you've been funding.

UB: You are absolutely right! So this sort of questioning and thinking has led to some sort of fundamental changes in terms of the way that we do our goal-making and I think maybe we might speak later a bit about, after the first lockdown, when we reopened, some of the kind of changes to the programs that we made. One of the things that we've introduced which I just wanted to speak a bit about is around a new process that we've brought into our grant making which is an enquiry call. That's the option to have the chance to talk for around 45 minutes with one of our grants managers and this is a kind pre-application support. In *Arts Access & Participation*, we've decided to really focus on that support for certain organisations. We don't offer it as something that's for everyone because we recognise that some organisations are in a better position, in terms of their capacity and the funding that they've had to date, to be able to apply to Trusts and Foundations. Whereas many organisations have historic under-funding and those organisations are the ones we want to be able to offer this additional support to. But because we recognize that the funding landscape is very different in Northern Ireland, we'll offer these calls to all organisations in NI.

One of the key things about these calls is that we also want to be able to say "no" sooner to organisations, which might sound a bit counter-intuitive having said that we want to open it, etc. But actually, we know that our process is quite labour-intensive in terms of going through that application process, so we really want to be able to say to organisations, early



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on in a process, “actually I don’t think this is the right fund for you,” or “I don’t think it is the right moment for you.” And there is one other area that I’ll just speak about which is we’ve started to do what we call in our kind of funders language ‘On-Granting’ and what that means is that we’ve started to give money to organisations that have good relationships with their local communities, and that they themselves then gives grants to those local organisations or those grassroots organisations. So, it’s a way in which we can support organisations who just wouldn’t be eligible for the main *Arts Access & Participation* fund and I think that that’s a really interesting approach that we want to do more of. We just started to do this in the last couple of years so that’s another change that we want to think about.

LB: And that potentially opens up a lovely route for a small more grassroots organisation to receive an ‘On-Grant’ as you call it. But then, perhaps in a couple of years time, be in a position to apply independently as well, so that sort-of lovely feeding of the pipeline, as it were, and supporting the ecosystem more widely, perhaps, than previously. Ushi, I think, what you’ve said there about supporting perhaps smaller community-based arts organisations, and ones that haven’t been funded by Paul Hamlyn before—perhaps just they don’t have the resources or capacity even to have a dedicated fundraiser—that really resonates with how Arts organisations work here in Northern Ireland, whereby I see fundraising being sort of squashed into another staff members role. And there’s this really interesting conflict between the timeframe of fundraising, where you submit an application, and you might not hear for 4 to 6 months or so about whether you’ve been successful or not, and yet you know the person writing that application has to deal with the leaky roof that’s dripping onto their desk right now, or a cancelled workshop this weekend. There’s that sort-of more firefighting, perhaps short-term help to deal with, and it’s hard sometimes to set aside the time to invest in that application process. But I think that the value of that ‘No’, although it might be hard to hear, actually could save you days of time, so there is absolutely a value to that. And I think as often as one door closes another door open, so that’s reassuring to hear that you are making those tough calls as well, but as early as possible.

Perhaps I can talk a little bit more about the particularities of the funding context here in Northern Ireland as well, briefly. There are a lot of small to medium-sized arts organisations, and we are the area of the UK which receives the lowest public subsidy of the arts per-head of population. Now every region faces its own challenges, that is one particular one for us. Long periods when there’s been no government at Stormont leads to a lack of decision making and investment for the future. The Arts Council here funds its core-funded organizations only on a year by year basis, making planning very difficult as well. It’s not a list of negatives this I promise you but just acknowledging the challenges. The private sector is small here, which affects levels of corporate sponsorship as well as the number of local wealthy individuals who might consider being philanthropists and of course we’ve had Covid but that applies to everybody. But I think it is important for us to acknowledge these factors, realize that that’s the reality in the context within which we work and I think, therefore, that open door from the Paul Hamlyn Foundation and from other foundations as well, is really



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reassuring. That we can, you know, have that opportunity to talk about what we're faced with. And actually the one great factor that I forgot to mention is we work within a post-conflict society as well and that informs a lot of our programming, you know. By no means all of it, but a lot of it. A lot of our outreach work and also funding as well, because inevitably, that has implications on sort of the equality of the distribution of funding, too. And you've talked about some of the changes there that you've made most recently. Were those in response to your experience during Covid? Or is that just a sort of evolution of the foundation?

UB: So yeah, I think it is partly evolution, but also when we, you know, we paused our main grant making during Covid, and when we reopened that was an opportunity to rethink some of things, some changes. That was that was partly where it came from. But I think also, during Covid we learned a lot and obviously during the pandemic we all know that existing inequalities became worse, and they came more to the surface became better understood. And when we were working we give emergency grants to, on a whole, to our existing grantees I think there was a shift in terms of the kind of conversation that we were having. So we were talking to them about what they needed and actually being able to get come behind that and get the sort of support that was needed in that moment and I think that changed the kind of relationships to a new way of having these conversations.

When we reopened we recognised that the Arts Sector was in a very different place and you know, before Covid, we had, through Arts Access and Participation these two really clearly defined routes. Up to £60,000 for Explore and Test and then we have this bigger fund for up to £400,000. And when we opened we just wanted to be able to have a space and a fund that could answer that question, 'What you need now?' for an organization. So rather than putting them through these quite narrow, sort of specific, need to be testing something, you need to be in this position. And so we've changed that and there's grant routes so we just have one route now. So it's a two-stage process and the funding can go from £40K to £400K. We'll be only be to making a few grants at that upper end. Our average is kind of around £250K I think.

But within that we can support a range, so that might be a mixture of program costs, core costs and overheads. So we are a foundation that supports salaries, so quite often that is part of the mix that we have, we fund those salaries and we know that' quite hard to get funded in some cases and sometimes we end up funding roles that aren't necessarily the direct delivery of the work that going to make the change that we're interested in. It might be that what's really needed is a general manager or an assistant or administrator or a finance person. So we kind of want to be able to respond to what's needed for an organization to be able to make that change. And we do multi-year funding, so any grant would be up to 4 years as a maximum but that's not to say that that's the end of the grant relationship. We have lots of organisations who we have been funding over a much longer period. But the initial stretch is 4 years. And we very much recognise the funding landscape



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in Northern Ireland and that multi-year funding from us can make a real difference because it gives that longevity and allows organizations to plan.

LB: Thank you, Ushi. It's just fantastic to know that funders obviously, of course, take these things really seriously, but I think sometimes we, as charities, can sometimes feel a bit of a distance, perhaps, between us and the funder. And I think there is the practicality for funders that applications are going up, right? There must be a sense of, "Gosh, if we just got the processes in place simply to deal with the practicalities of hundreds and hundreds of applications coming through." The need is very real, so I can understand why funders might have more of an arm's length approach to dealing with grantees or applicants because, I imagine, it can feel a bit overwhelming at times to see how many applications are coming in.

I wonder between the 2 of us whether we might explore a little bit about the process of preparing and submitting an application. You talked to the enquiry call, and how important that has been. But I suppose this the step beyond that as well, as somebody who must assess applications on a very regular basis, I'd love to know or hear from you about you know what makes an application sing really and for me the sort of the key of it is organization, and you know quite sort of a systematic process, whereby I research. If I've identified the project, or the salary, or the area of activity that that I need to fundraise for, I would research a number of Trusts and draw up a short list. I'd go straight to their eligibility requirements usually on their website, because that'll knock them off the list immediately, if I'm excluded from their criteria for funding, so that that's a really important step. And then also identify whether a trust is open to having a conversation first or not. And we've talked a bit about that.

I think the other really important points to reiterate. Going back to what I said about the longer-term timeframe of fundraising versus immediate challenges that staff are coping with, is working out when I need to submit by. It's such a practical question, isn't it? Paul Hamlyn has a rolling deadline, doesn't it? So, you could submit at any point in the year. Sometimes that can be slightly, "Oh, Gosh! It's May and I said I'd have an application in by March. Whoops!" Setting myself a deadline, being public about that with colleagues, and drawing up a process of "let's get our first draft together by X date," and then move on to the second draft. I think it's a really sort of important practical point that people sometimes miss.

And I think also looking right ahead. If you're fundraising for a strand of activity that starts in January 2023, and you know that the funder takes 4 months to assess the application, then you need to have submitted by the end of what August the latest. So, it's all that sort of planning and thinking ahead. But once I've done that, I do find when I stick to my own dates, that you can do it. It's really quite reasonable, and you can get it done. I like working with the colleague, so you know if it's a very small arts organisation, maybe it's a trustee to just read a final draft. It's always good to have a fresh pair of eyes on an application. Also, being honest about how I work best.



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I write most effectively in the mornings, and for maybe an hour or an hour and a half maximum. So instead of blocking off a whole day, "I'm going to get it completed in one day," I'd be going for a walk by 2 o'clock and going, "No. No more." It's very personal, isn't it? I was working with a theatre director recently on an application, and he said, "I wish I could just speak this Lucy," and I'm like, "Oh, that's an interesting point." Sometimes people are much better about vocalizing it. You just need to find someone who types fast and can get down what you're saying, so it varies from person to person, I guess. I would recommend to anybody to just be honest with yourself about what's what. How is it best for you to communicate? And I think importantly, in your own voice, as well, particularly as we're the ones doing the work on the ground, and we know how to do all of this. Sometimes we forget how to explain it best to somebody who perhaps isn't so familiar with our work.

UB: Yes, I mean, I think one of the things is about your own voice, and keeping things simple and avoiding jargon, and not assuming too much in terms of what they might know about your organisation. Coming at it as if they're learning for the first time; that they're a beginner. A lot of the challenge for Trusts and Foundations as well is what you're saying about the length of time that we decay to assess applications, and I think we take too long. And one of the things that we were able to do during Covid was to make grants really quickly. We surprised ourselves because we never thought that we'd be able to move at that speed and we did. Obviously, that was very particular circumstances, and often we were given grants to organisations that we already fund so there were short passes there with understanding the basics of organisations and due-diligence and so on. But I think we are really considering our processes and the way the turnaround time; whether there are other ways in which we can work that will make those not as long. To shorten that time as we recognise that to wait 4 to 6 months is a long time.

But just one thing around Paul Hamlyn Foundation is that we do fund non-charities, and not all Trusts & Foundations do, and there's very good reasons for that. We are a charitable foundation ourselves so we can only support work that has charitable purpose. The easiest way to do that is to fund charities; that's the most straightforward. And so many Trusts & Foundations say, "we're only going to fund these." But we recognise that there are many different models and organisations that for lots of different reasons want to be structured in alternative models to charities. So, we can fund non-charities, so long as that work has public benefit and charitable purpose.

One of the first things I was going to say is that there is no perfect application, and hopefully that's helpful to hear rather than troubling to hear. Helpful to hear in terms of just taking off the pressure, and certainly for the large applications, we always need to ask more questions and go through clarification. And in a way we're expecting to, because all the organisations are different, the work they're doing is different and we have the same application form. So it's inevitable that going through that one process is not going to catch all the nuance, so



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that we'll have to come back with follow-up questions and ask for more. So I think just hold on to that, that there's no perfect application.

So, I think there's always 2 aspects to a successful application. The first thing is that your work aligns with the foundation, the fund that you're applying to, the criteria and what they're looking for. The second part is that your application demonstrates that you've got all those things that a funder is looking for. Sometimes it has a similarity with job hunting where there's an organisation, an employer, that's looking, that's got a role, and skills and experience that they're looking for and that you want to match up with. And then the second part of a job application is actually demonstrating you've got those skills and experience. So, in many ways in terms of that first aspect about whether your work aligns or not, you don't always have control of that, because there are certain funders and certain funds, you've got your work, and want to try and find that synergy but what we absolutely don't want organisations to do is to be creating work to fit our funds. What's hard for me as an assessor is there's so many good organisations out there, really good work, but they're just not going to be the right thing for PHF; they're just not going to be the right fit.

When you've got to the point of recognising a fund that does have that alignment, one of the things that is a good tip is: if you're going through the application process, and you're finding it relatively straightforward to answer the questions, that's a good tell that, actually, you are a good fit. If you're really struggling and you're just going, "Oh, I don't what this means; Why are they asking me that this? I don't have that information," it's probably because it's not a good fit. Probably. It could be that the application forms not designed very well, which I also accept could be a reason. But on the whole, we try and design questions that will lead to extracting the information that we need to know; that is about alignment to the fund. So, that's quite a good tip.

You mentioned getting someone else to look at that pitch and I think that's a really brilliant idea, just to double-check that you've actually explained what you're going to do. Including what the art is, because I read a lot of that applications and I get to the end and I know a lot about the values of the organisation and what they think about power of the art, and why it's important to do it. But actually, I don't know fundamentally what they're going to do, how they're going to work with audiences, who they're going to work with, and what's the art as well? Be careful, as I think sometimes also with word counts, you can end up over-editing and losing some sense; losing some of the fundamentals of what it is that you're going to do.

So, another point, which I think is often talked about in creative writing is about showing and not telling: really demonstrating that you are a good fit to the fund. There's an example I always give. We used to run a fund that was about innovation. Somebody just saying, "this as an innovative project": that's just not enough. You need to actually tell me, what is it about this that's innovative? If you're thinking about an *Access & Participation*, and you've got this really interesting approach or way of changing things, tell me what that's about!



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Demonstrate how that change is going to happen rather than just telling me that it's going to happen.

LB: I think sometimes when we're so involved in the work that we do, we sometimes forget... almost the core components of it. It's mad. It's crazy that you get to the end of their application, not even knowing what the art form was they were working in. But I can also empathise with... you're so passionate and involved in what you do that sometimes it can be really hard, or you just miss those key elements. So that's a really, really important point to make here.

UB: Application forms are also asking particular questions, and so they can sometimes lead to things being cut off as well. You know, it's not a conversation. I think that in order to help with that, definitely get the people who are closest to the work involved, and I think that's absolutely key to hearing the voice of those people.

The last thing I'll say on this is about budgets, and I know everyone has different things about budgets, but at PHF, we think that budgets that come with the application are really rich sources of assessment material for us. We really dig into budgets and we look really carefully at them. We don't ask for them to be submitted in a particular format. So actually there's a lot of opportunity there to put in detail that you might not be able to get in the word count of the application. You can write in the narrative of the budget or the headings of the budgets and budgets lines. It just gives that bit more information. You can put how many participants there are, how many times per year you're going to do it. You're just adding, and the projects going to give more of that storytelling that we're looking for.

We also really look to budgets in terms of what it tells us about organisations' practice. Thinking about how much you've budgeted for the different areas that you're talking about: access costs, or evaluation, or training for artists, and often we have applications where they talk about how is fundamentally important, and not there. So there's a reason to understand how it's valuable, and how an organisation is really thinking about these things. We go to the budget, and it's a very good source of assessment for us in understanding how organisations work. So I'd encourage people to really not just see it is something that's got to be just put in, because it's being asked for, but how can I use it to demonstrate the work that we're doing?

LB: Fantastic. I feel inspired to start an application just for the hell of it. I'm just going to make a few comments on an evaluation which you mentioned just there. You're huge on that and I think it's so fantastic that the Foundation both insists on it, but also encourages it, and that you disseminate research findings and clusters of funded organisations. There's so much on your website that I think smaller arts organisations, that may be working in a bit more of an isolated way, can learn from. We don't want to research ourselves out of existence, but we do need to always be cognizant of the impact we're having, because that's got to shape our future work. We need to be learning and growing just as much as you've talked about how



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the Foundation wants to learn and to evolve as well. That sort of constant cycle is so important to keep both of us, the arts organisation and the funder, relevant. And creating that change in society that I think most of us are here to achieve, that we want to.

UB: Yes, absolutely. So, evaluation has always been a very fundamental of the way that we work and that's a really key part of our criteria as well, both in terms of that formative evaluation where organisations are really focusing on understanding the change that they're having, and whether the way in which they're working is being successful in that, but also that shearing and thinking about sharing with others. I think a lot of people are kind of worried about evaluation and see it as a something that is asked for by a funder, but perhaps for them it's not something that is as important. I think it's often seen as advocacy, and it's about facts and figures, and how much work we've done and feedback for funders. But we really encourage organizations to think about it as reflective practice for themselves. So really having those questions, thinking about: What you hope to learn from the work? What change are you looking to see happen? How are we going to know that that's happening? How are we going to understand whether this is the most effective way of doing things? How do we change? How do we make this better?

I think it's part of that process, but with regards to feeding back and reporting to PHF, we want to hear about the impact of the work. I think it goes back to that thing about demonstrating rather than telling. Demonstrate how that impact is manifesting. And we do also want to really hear about things that haven't worked as well as those things that have worked well. That's partly also for our learnings as a funder so that we can understand when other organisations are going into the same work that you're doing, that you've discovered a big thing that you should have done differently at the beginning, but you can share that with others as well. That helps to improve and support our practice and our understanding of the field through your own learning. I know that's really quite complicated, because often organisations don't want to talk about what hasn't worked? But I think of we could change the relationship around evaluation, that's one of the things I'd want to do; to be able to have an open relationship where organisations feel that they can talk both about things that have worked and things that haven't worked.

LB: Yes, it is a strange situation, isn't it? It goes back to your lovely comment about, "there's no such thing as a perfect application," and there's no such thing as perfect delivery! We're messy human beings in a messy world, you know, and that I think is part of the beauty? And then I imagine you're always interested to know about the unintended consequences as well? The things that, "Oh, my goodness, we didn't see that coming," good or bad? But I think we set ourselves up that we will somehow deliver perfectly without anything... it's not life.

UB: Absolutely. We're very aware that when we set reporting and payment schedules that actually they're likely to change, because what you'd anticipated 6 months before the start of the project—when you perhaps put in the application and when you thought about



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timeframes—that's going to change, because, as you say, we're human. Things get messy, things happen, the world changes in ways that we weren't expecting. We do, as a funder, really recognise that. We will set the schedule at the beginning because we need to but we're very open to changing that and to working with organisations if they need to take more time to get to that particular point. I think that's fine with us and we're very open to that flexibility, which again is part of that relationship that we want to have with organisations.

LB: Well, thank you Ushi. Thank you for Paul Hamlyn's generosity, My goodness! He started off life selling books in camden market from a wheelbarrow, didn't he?

UB: That's absolutely correct, yes. I think the work that he did, and the way that he thought about kind of challenging the publishing world, bringing books into places like supermarkets outside of refined bookshops, and opened up the opportunity for people to read it in that way. When I think about that, even at the start of foundation, there was that thinking about opening up opportunities, and social justice.

LB: Well thank you for all that you do.

UB: It's a pleasure, it's lovely to have had this conversation.

AB: **If you'd like to know more about Paul Hamlyn Foundation, you can visit www.phf.org.uk, where you can find out information about their research and strategy, their various funding opportunities, and request an enquiry call. Through Arts & Business NI membership we support arts members with identifying relevant and suitable funding opportunities, contacting funders, making applications, and communicating impact. If you would like to start a conversation about your fundraising strategy, a project that you need funding for, or to find out more about what's included in arts membership, visit www.artsandbusinessni.org.uk, or email info@artsandbusinessni.org.uk**

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