

360Giving Event Transcript

29th September 2022

Fran Perrin

This is literally the last thing I have to do as outgoing Chair and I couldn't be happier.

The reason I'm happy is because I'm leaving an extraordinary organisation, but in extraordinary hands. Not just our amazing staff team, our amazing Chief Executive and our amazing new Chair of the Board - a Trustee Board that's changing, so I am very, very hopeful for the future. But you will hear from others about the next stages...

Tania just asked me to say a little bit about what we've done over the last few years. We were going to host this event two and a half years ago but then 'events' happened. And actually it's been a really rich and important time for the work that 360Giving has been doing, and a lot has changed.

Steven was just reminding me, that it was probably seven years ago now, that a group of us, sat in this very room kicking around the idea of what would it look like to have an open data standard for the charity sector? And why it must not be possible, because if it was possible, someone would already have done it? It turned out that wasn't the case and it had been too difficult to grapple with.

So, with the help of a couple of the founding gang that are here today, we set up 360Giving because we love the charity sector and the foundation sector so much, but we got so frustrated about how hard it was to find any information. And when I was in my early stages of being a donor, I always thought I must just be the clueless one. Everybody else must know what's going on and I'm the only one who can't navigate it - but then found that while we all have amazing relationships between the people we work with and the charities with support, finding the information is incredibly hard and that just seems wrong in a modern internet era.

So we thought, well let's try this. What if we had a data standard that was developed for foundations for small teams, not just vast organisations, that made it really, really easy to share data in a way that's useful. And we tried it, we workshoped it. We tried to make sure that this idea would work for foundations, the donors and crucially for charities and fundraisers and academics, who would want to use the data.

We didn't want to create a data project that was never used and that was a really founding principle for us. We wanted to make it possible to find the projects that you wanted to fund, to

find the other foundations who might fund with you, to learn what happened in the past and attract things as much as possible in real time to make all of our jobs easier.

Unprecedented is probably the year or the decade at the moment. But we've seen during the last few years, foundations and funders needing to know what's happening as it happens, so that we can maximise the use of resources. Having said that, when we got going, I was lucky enough and I'm still very lucky to be able to be partners in crime with my husband Will.

When I said to him, "maybe we should do something about an open Data Standard, but it'll never work". He said "just do it". In those days, I was very cautious because the philanthropy sector doesn't always move at lightning speed and he said "you've got to be bold, have a moonshot goal, that is 80% of UK grantmaking funds published to open data standard that anyone can use within five years".

Now sadly I think it's taken closer to six and a half, but we've done it. I thought it was a ridiculous target but I thought "well, you know, it helps, it looks dramatic. It sounds brave." And then if we get to 20% that would be amazing, and I never really believed that all this would be possible, and that's a testament to the work of everybody here today."

Where we are now is 233 funding organisations, 750,000 individual grants, £175 billion worth of UK grants published through the 360Giving Data Standard. So moonshot: tick. And All the sectors within our world are represented. In the funders, people in this room, central and local government, community foundations, corporate foundations, family foundations and lottery distributors.

And we met our goal which is that the same standard, the same tool works for Wellcome and National Lottery to tiny foundations that might have one and a half members of staff. It works for everyone. 360Giving is now the official government data standard for grants, and that one was hard.

All of this has taken a lot of work by a lot of people but it really, I think, shows some of its worth in the most dramatic way during the covid response when the team was nimble enough to develop the Covid-19 Tracker, where foundations were updating very, very fast the grants they were making, in the early days of the emerging disaster. And a lot of funders really stepped up, not just with the speed they were dispersing money, but the attempts to co-ordinate, to collaborate, to make sure the money was going to where it needed to and, we could prove that data is not just a nice academic thing, this is what we need to make our jobs better.

I'm particularly proud - even though I'd played no part in it - in the Diversity, Equity and Inclusion Data Standard because that is saying we can keep on adding value, if we can get consensus around a piece of data that's been too complicated for anyone to agree on before.

But we can co-ordinate, we can consult and then all of the wonderful funders in our community start sharing that data. And it opens up so much possibility to look at where we

are, and the equity of the sector at moment, and where we want to be and to make that a helpful resource for the charities themselves.

The Standard keeps on changing, it is never going to be fixed, immutable. And there are amazing projects that are partly through or starting around geography, about regranting, and now, grants to individuals, which are the start we said “that's just never going to be possible, that's too difficult. Keep well away from that.” But because of the reputation that the team has built, and the trust that people have in us and the Standard, we can now do that and we can respond to foundations saying “this is what we want to do next”. This is what we would like the standard to help us to do. And particularly it being user led - What do charities need from this data or the funders do as they become much more skilled Data Champions, not just using the data, but looking at their own organisations across all of our funding work, across all the ways we charities, do we have the data we need? Are we sharing it? Are we learning from it?

We really tried to make sure that where there are interesting conversations happening 360Giving is involved and listening and helping drive the conversations. So most recently 360Giving worked on specialist legal advice, and did a piece of research providing analysis, influencing policymakers and not just for existing funders of the work but helping bring new groups together to see how they could allocate money. And it's in my interest as my own trust Indigo funds the provision of legal services, and law centres, I was really passionate about this because everyone should be funding this. That ability to start the conversations to join people and join people up is really important.

I can't quite believe it has been seven-ish years now. I fully stepped off the Board and you'll hear from our amazing new Chair. We only have one other board member, who's been there almost from the start but it's lovely to see other members here today. We started as a kind of ragtag group of people just working together collaboratively not part of our job descriptions and this was not something we were probably supposed to be spending time on. But all of us were united by wanting to do everything we could to help the foundation sector be the best it could be and change the experience for the charities we work with.

Tania asked me what I am most proud of. The things that I am most most proud of are that this has been voluntary. At the start of this we said “should we just be lobbying government to change regulations and force everybody to publish?” I very much voted against that because I think that philanthropists are good at pushing back sometimes against changes that they're not bought into. But we thought that the foundations would understand the value of this would understand this and they could see how it would help charities that they really care about helping. So it was a long time of going door to door, saying you never really heard of this open data thing, but this is why it helps, this is why I would help your work. And I'm so grateful to all the early foundations, who took a real leap into the dark and quite often signed up, not really knowing what I was talking about.

But that got the momentum growing, more people got involved and the team worked tirelessly to make sure that they had a positive experience. So the fact that this has come

about with no one being forced, no one feeling that they had to do it or they get into trouble. No one feeling that it was just the tick box thing they had to do, but they understand why it would help. And I do believe that's what foundations want to do. They want to help the charities they work with.

This is in a way, a little thing, but I'm very proud to be leaving because I never wanted this to be the 'Fran Perrin project' and it absolutely hasn't been. I've been happy to sometimes be the public face of it because I love working with other donors. And I wanted to show that this was not going to be a scary transparency thing that would get them into trouble with newspapers. That I understood their fears and concerns, but this was a step we could take.

But I wanted to know that this organisation would exist because it's driven by so many people, because it is owned by the community that it serves. And that's what makes me happy to step down, not because I want to get rid of everybody and see the back of it, but because 360Giving doesn't need me anymore, and that is the best place to be in.

And I'm incredibly excited to see what Fozia, the trustees and the team will do in the next few years. I can't wait to see what the next moonshot is going to be, but I know the 360Giving will keep on driving the conversations, being ambitious, making sure that the charities and the users come first and I'm feeling incredibly grateful that I've been able to be a small part of that, so thank you.

Tania Cohen

So at the risk of sounding like a supporting actress at the Oscars doing the thank you speeches, my job is going to be to do thank yous and I'll try to keep it as short as possible, but I will be reading for my list so I don't miss anyone.

So firstly a big thank you to Fran. It's rare to have the privilege of working with someone who is so talented but also so humble, it's been an honour to be part of Fran's team. I really enjoyed working with Fran and her leadership has been so important to the organisation and to me, and as she mentioned, what's been achieved has been incredible, and I think that is in no small part down to Fran's leadership and her vision.

And I think the other part of it, I don't know if Rachel is here yet? I also wanted to say that I've only been able to do the things that I've been able to do over the last couple of years, because I inherited a firm foundation from Rachel, who was the first chief executive for the first four years, who did a great job. And in fact, this event was supposed to happen, as it was supposed to be Rachel's leaving do and my welcome. And so hopefully Rachel will be able to come today and to share this because she played a big part in the journey that we've been on so far.

And as I was preparing for this I looked at the notes from the previous event that was going to happen that got cancelled, and actually one of the things that you could see even looking

at the invite - we've got more than double the number of funders publishing now than we did, when those invites were sent out for the previous event.

And I think that's in no small part due to the really hard work of the team and a big thank you to my team who have been amazing and I think particularly to Katherine who has done such a brilliant job, rising to the challenges in difficult circumstances and has provided amazing support both to many of the publishers in the room but also to the team internally and to me helping me get up to speed and putting up with all my questions and ideas. I wouldn't have been able to do without Katherine.

As Fran mentioned, an extension to our team is the team Open Data Services Cooperative. And we have Steven and Rob here today, and for those who don't know, Open Data Services Cooperative provide all the support for the data standards and advise us, but also do the development and maintenance and support for the tools.

And again, also deal with our ridiculous questions. Like why can't we do that? And a really important part of the organisation and again, what we do and how we do it, we'll be able to do that without the team in place.

And Fran mentioned, we've got some of the former trustees here but also the current trustees and also really important to the organisation. And I want to do particular, thank you to Geoff, who's been our fantastic treasurer for the last six years and will be ending his term of office in November and it's been great to work with Geoff and the organisation has changed massively in that time, it's been really good to have his support as well.

Another big shout out is to our Stewardship Committee and we've got our Chair here Linda. The Stewardship Committee, a lot of people don't know about, but it is a really important part of our governance, the Stewardship Committee looks after the data standard itself and Linda's our independent chair. But we also have a few other members of the Stewardship Committee here. And we're really pleased that we've been able to recently recruit new people onto the committee to reinvigorate the committee. And we also have more publishers on the board of that community. And that's really important to us.

And you'll see that the Stewardship Community, the Board and Staff have got badges on. That's so that you can see who the Stewardship Committee are, and it's really important to have publishers engaged in our work and shaping that work going forward as well.

And also for so many of you for being involved in steering groups and user research, I'm looking around this room and there's lots of people who have been the people on the list that we've been calling and phoning and hassling generally. but it's really important for us to make sure our work is shaped by you and it's meeting your needs.

Big thank you to our funders. So Esmee Fairbairn Foundation, National Lottery Community Fund, Indigo Trust, Paul Hamlyn Foundation, Tudor Trust, and Pears Foundation - and they've all done more than just give us money. The money is important,, we wouldn't be able

to do what we do without it. But I think it's also really important that these organisations have championed our work and Fran talked about some of the people and organisations coming on board early. That's really important and to share the confidence in what we're doing and supporting others to get involved.

And thank you to all of you for coming today, and for publishing your data, it is really important we are really seeing the collective impact of all of that data coming together and we want to extend that even further with the new strategy. So you'll see there's leaflets around here and on the way out as well just to give some highlights about what we're planning to do and really ambitious plans for the next few years. But I think it's possible for us to do things collectively. And for us, it's not just about what we do, but how we do it and our values are at the heart of our approach.

It's been great to have so many of you engaging in the strategy. It's been brilliant to see the collaborations expanding to extend our impact. So Fran mentioned the work with the DEI data group, but also the work with the Grantmakers Alliance and the Association of Charitable Organisations (ACO) has been fantastic to look at how we can really work with new organisations and reaching organisations, and our work with the Access to Justice Foundation on the specialist legal advice. Those collaborations and partnerships are really core to what we do and how we work.

And we shared in our newsletter, on Monday, our approach to inclusion and the fact that we have been awarded the NICE kitemark for Neurodiversity Inclusivity Confident Employers. So, if that's something you want to know more about, then do get in touch. And it's something that's really important for us in all our work and to really embed our values. And I think it's also something where we're seeing the benefit of that both in terms of our strategy and how others are working with us as well. So we look forward to working with you further and continuing to have more exciting development to come over the next year.

And with that, I'll introduce you over to Fozia.

Fozia Irfan

Hi everyone, I've got big shoes to fill haven't I? I think that's the first thing that struck me when I walked in. I'm basically going to talk about three things. Firstly how much we owe to Fran. I know she's going to be embarrassed about this, but I am doing it anyway. Secondly I will talk a little bit about looking forward, and the strategy and what we're planning for the future. And thirdly is really a call to action in terms of the work that we do, the work that we do and how much we need everyone's involvement.

So in terms of thanking Fran, I mean, Fran has this way of persuading people to do things that they don't even realise that they've said yes. Hence me being here. But I think that's a rare talent.

And I think what really struck me when she was talking was the point about using regulation and legislation to push people to do things, or persuading people that this is actually really good for us, this is good for the sector and this is good for communities. And that approach really epitomizes the way that Fran works. As well as that, her attention to detail has been brilliant. Her vision in terms of where we need to get to has been brilliant and it's been so inspiring for me, you know, standing on the sidelines watching how this organisation's grown and how important it has become to the sector. And that really is a testament to Fran's work, so thank you Fran.

And just carrying on from that. Somebody asked me: "why did you put yourself forward for this position?" And actually I have to tell you that I have four boys and my husband and we're all sitting down. And I told him about the organisation and they didn't really understand what it was about, and I talked about data and why it was important and they literally were laughing on the floor saying you're going to be involved in this? Because I have difficulty around navigating my way around the TV remote control. So I am not the most likely candidate for this position.

But in a way I think I am the most likely candidate, because of the fact that I am not a data expert, but what I do know is what I want data to do, what I want it to get us to. And so, you know, people who know me know that I'm really passionate about inequality, about poverty, about the issues that are happening around us.

And whenever I talked about poverty, inequality, and people say to me, well what should we do be doing? Should we be campaigning, should we be lobbying, should we be out on the streets? My first response is always, we should be focusing on data and people are surprised at that because, you know, that's not the most immediate and obvious answer, but I really do believe that we cannot have just transformational change without understanding who we fund and what we fund. That's the basics of it.

And that's why it's been so brilliant to see what 360Giving has done. And in terms of looking forward, you know, this first stage that we've got to in terms of people publishing data has been critical and has built up the credibility of 360Giving. What Tania and the vision of the Trustees is going forward is really thinking about how we use the data.

So we've got the data now. It's great. People can access it. People can look at it. But how are we using it in our funding decisions? How are we using it to identify gaps? How are we using it to see where the need is the greatest, that's the next phase of 360Giving and that's where we need your help as well.

You know, we're doing more research and more analysis and that's really fundamental but we also need your cooperation to say to us, well these are the gaps that we have identified, this is the data that we need, this is how we want to use it. That is fundamental for our growth going forward. And for me, I think we cannot have that truly transformational change until all of us as funders just start using the data in that way. Collaboration is key, and anyone who knows me knows that I like to work in collaboration. And I think, funders, this is one thing we

need to get better at. The example of the legal justice network work is a brilliant example - where funders are coming together and not duplicating what we do, which is such a waste of resources.

So I think just to end with what I would say is that 360Giving cannot work without you. It just simply can't. It relies on your input, it relies on you taking part, it relies on you providing the data, reading the guidance, providing the questions, challenging us, provoking us. Saying to us: "Well, why aren't you doing this? Why aren't you doing that?" That's what we need to continue to grow. So, my call would be, please stick with us, commit to us, as you already are, because I really do believe that transformational change happens with a small group of committed people. Thank you.