

**The Tudor/LankellyChase Partnership:
Lessons from a collaboration between two grant making trusts, 2005 – 2010.
The results of a review held by Alison Harker and Steven Burkeman.**

Two very different grant makers, the Tudor Trust and the LankellyChase Foundation, joined together as the Tudor LankellyChase Partnership (TLC) to develop a £2.7 million funding programme on criminal justice issues in the South West of England. This paper summarises the story of their 5-year long collaboration, and the lessons learned from it.

Key Points

- The partnership between Tudor and LankellyChase was highly effective. Because of shared interests and mutual benefits from working together, the Partnership proved to be more than the sum of its parts.
- A key feature was the level of delegated responsibility for grant making to a few trustees and staff from both trusts.
- Possible pitfalls included placing extra burdens on applicants, and an imbalance in the relationship between partners owing to the size of their contribution. While these were avoided, there was some confusion at the outset amongst potential applicants about the nature of the partnership.
- TLC arose from an existing good relationship between the chief executives of the two trusts. Thereafter, its success depended first and foremost on good inter-personal relationships between people - trustees and key staff - from both organisations.
- Where such relationships do not already exist, time needs to be allowed for them to develop. This means creating social and other opportunities for people to get to know each other.
- There was a clear written agreement on mission/objectives but in the event it was not referred to throughout the life of the TLC partnership; it was nevertheless important to have it, just in case it was needed.

The Story of the Partnership

TLC was designed to support small agencies working with offenders and their families in the South West of England, in the context of the birth of the National Offender Management Service (NOMS), and consequent implications for the region. The partnership began in 2005 and ended in 2010. After an initial fact finding exercise in the South West, a 3-year £1.5m grant making programme was established - *phase one* - to enable agencies working with offenders and their families to understand and interact with NOMS. During this time TLC was able to build up its knowledge of the area, its agencies and structures and NOMS itself. But by the end of the three years, NOMS was still not really up and running. However, TLC had been able to:

- help significant organisations to maintain a presence in the South West;
- facilitate organisations coming together;
- reduce the isolation of small organisations;
- make some successful individual grants which demonstrated some very positive models.

And, importantly, this period paved the way for the second phase.

Two Open Space¹ events were held, involving funders, grant recipients and others – these then influenced the shape of *phase two* of the partnership. The events enabled people to make new contacts and generally enthused those who took part. An additional £1.2m was allocated, over two years, for grants to encourage voluntary and community sector agencies to work together. The partnership ended in March 2010, but several of the 42 grants made continued for some time thereafter, as work was ongoing.

Why did Tudor and LankellyChase create a partnership?

In 2004, the Government announced the creation of NOMS. It was believed that the new integrated service would provide opportunities for small voluntary organisations to develop their engagement with prison and probation services, particularly in relation to the resettlement of offenders. Both trusts realised the significance of this and it gave considerable impetus to their desire to work together.

The trusts contributed equal amounts to the TLC fund. Combining the funding was significant – and for LankellyChase the opportunity to work as an equal partner to Tudor, a significantly larger and longer established ‘player’, was valued by trustees, especially as LankellyChase itself was a new creation as a single trust. Tudor greatly valued and respected LankellyChase’s knowledge and experience in the field.

Why did the two trusts choose to work in the South West region?

The region was already known to both trusts to some extent, and has a good range of prisons and voluntary organisations. It presented interesting challenges because it is a difficult area in which to work; its geography raises problems with communications and distance management, leading to higher costs.

Why did it work?

There were several key factors in the success of the partnership:

- The two trusts had shared values and interests. Both were interested in:
 - the sector and its issues;
 - reducing re-offending;
 - taking risks; and
 - working with small, sometimes unusual and under resourced organisations -- some with less of a track record than others.
- The personalities involved got on well and there was mutual respect and trust. Those involved were all heavily committed to TLC and invested great energy in it.
- The trustees of both trusts were adaptable when it came to meetings, accepting that things would inevitably be done somewhat differently, given that they were working in partnership with another organisation with different traditions and practices.
- The key staff involved worked well together and managed the whole process with great skill. Staff participated fully in grant decisions, making it truly a joint committee.
- The region on which the partnership focused was well-chosen. The Bristol location for meetings helped partnership members get a greater understanding of the area. The combined human and financial resources focused on the South West region enabled the partnership to scrutinise NOMS and conduct informed discussions with its staff.

¹ A useful description of the processes involved in Open Space meetings may be found on Wikipedia at <http://bit.ly/frPUM>

- The application process was 'light touch'; the assessment process was thorough, efficient and relatively quick and the ongoing relationship was developmental in nature. Both trusts were knowledgeable about the issues.
- Relationships between those involved were sufficiently resilient to accommodate other trustees occasionally attending meetings in a deputising role.
- The original aims of the partnership were not met due to issues beyond the control of TLC – particularly unexpected delays in getting NOMS properly under way. However, the partnership was sufficiently strong to withstand what might have been a significant setback, and adjusted its aims accordingly.

The result was that the TLC proved to be greater than the sum of its parts.

What were the pitfalls?

There are dangers in such arrangements; there were fears that the partnership might:

- Reduce the possibility of organisations making separate applications to both trusts. But this didn't happen in the case of TLC.
- Put an extra burden on grantees. However, once grantees understood the systems, they were perfectly happy with what was required of them.
- Prove problematic in the light of the difference in the resources available to the two trusts.

These fears were unfounded. Both parties contributed the same amount to TLC even though Tudor is much larger than LankellyChase. But different sized contributions could be an issue, especially in bi-partite collaborations. It is less likely to be an issue where there are several parties to the collaboration.

Guidelines for partnerships

Those involved in developing future funding partnerships should:

- choose the issue and the partner carefully, relying on anecdotal as well as hard evidence about each other and the strength of previously established relationships – described by one interviewee as '*the courtship phase*';
- be flexible and prepared to take some risks;
- be clear from the outset *why* the initiative is being undertaken and where responsibilities lie;
- have a clear focus on what is to be done and where, with an achievable target, a clearly defined geographic and/or subject area, and a budget large enough to make a difference;
- have a written agreement/terms of reference including a withdrawal clause;
- build in opportunities for people from partner organisations to get to know each other, on a personal as well as a professional level;
- hold meetings on 'neutral' territory;
- assign designated officers who are experienced in grants assessment as well as in the subject matter, and who are knowledgeable about their own trust's operations and values;

- be represented at regional/local events, especially those involving infrastructure organisations, and seek through such events to build links with those groups which may be harder to reach, such as black and minority ethnic organisations;
- consider holding an event for NGOs and other relevant people early in the process, in order that good relationships may be established, and the rationale for the initiative be clearly explained;
- consider what type of evaluation is required at the outset;
- consider holding a strategic review, perhaps 18 months into the process;
- maintain a close relationship with grantees throughout – for example, by meeting and talking with them regularly to progress the work;
- allow for the fact that a successful partnership is demanding of time and effort on the part of all concerned, and especially the staff;
- promote proper delegation of decision making, trusting those actually involved in the partnership to take decisions and report collectively.

Did TLC succeed?

Very little in life is either wholly successful or wholly disastrous, and any experience generates learning for those willing to learn. Though there were one or two areas where things might be done differently in any future similar effort, these are relatively minor in the grand scheme of things; **by any reasonable standards, the Tudor LankellyChase partnership was an outstanding success.** It showed how two organisations with very different backgrounds, cultures and working practices could work effectively together so that the whole was greater than the sum of the parts. Fundamentally it worked because the key people involved liked and trusted each other from the start or gave themselves the time to learn to do so.

Methodology

The writers studied the extensive paperwork generated by the two trusts when they were exploring what would be involved in working together in the manner proposed. They spoke with relevant staff and interviewed 20 people, including trustees past and present, grantees, and infrastructure organisations. Half were interviewed face-to-face and half by phone.

A full reflective report on the TLC partnership is available from either:

Tudor Trust, 7 Ladbroke Grove, London W11 3BD

Tel: 020 7727 8522 Email: enquiries@tudortrust.org.uk Web: www.tudortrust.org.uk/

or

LankellyChase Foundation, 1 The Court, High Street, Harwell, Didcot, Oxfordshire OX11 0EY

Tel: 01235 820044 Email: enquiries@lankellychase.org.uk Web: www.lankellychase.org.uk/