

# Setting intentions for the year ahead

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As part of John Ellerman Foundation's commitment to transparency, accountability and effectiveness, I thought it would be helpful to set out below the plans that the team and I will be working to in the year ahead.

Between October 2022 and January 2023, six new staff joined us to support the delivery of our organisational aim to advance wellbeing for people society and the natural world as set out in [our strategy for 2022-25](#). This has meant that the last few months have been busy with handovers, inductions and the setting up of probation periods. The team has also undertaken training in our grants database software, investing, grantmaking and productivity and time management.

Within our team of seven we have five hybrid workers, and two members of the team are remote workers based in Yorkshire. In order to support the team to get to know each other better, in January we held a team off-site in York from Monday to Wednesday. The off-site was also a good opportunity for everyone to:

1. Understand the Foundation's organisational purpose and strategy for 2022-25
2. Design and commit to positive ways of working together
3. Plan for the year ahead.

We left York with clarity on what the year ahead will look like for us all, and confidence in how we would achieve our goals. We also set up a team charter that outlines how we will work together in the next six months, when it will be reviewed again. The charter made it clear that we want to build a team culture that is nurturing and supportive, and that allows the team and everyone working in it to feel empowered and confident that they can deliver their work using the systems and processes that we have in place. We also discussed how we will achieve the balance between delivering both operationally and strategically.

In relation to our funding offer, we know that the new Grants Team will need to spend time getting to know our grant-holders and applicants, and our grantmaking processes, and that the wider team will need to build their familiarity with these too. We are also very committed to sustaining our grantmaking offer, and where possible enhancing it further. For example we know that we are receiving a much greater number of applications than before, and so we want to think about how we say 'no' to people and if this experience can be improved. Plus, it's now been nearly three years since we commissioned our independently-run perception audit with grant-holders and applicants, and it will be important for us to do this again in order to learn more about the effectiveness of our grantmaking and where improvements can be made.

As an endowed grantmaker, we have spent these last few years exploring what it means to be a responsible investor. This year we will redouble our efforts in expanding further our approach to shareholder engagement, net zero investing and impact investing. This will mean taking an even more proactive approach to our engagement with fund managers in terms of analysing and querying the holdings they invest in on our behalf, their voting decisions and having a fuller investment mandate that speaks to our ambitions around environmental sustainability and financial returns. We will also be busy researching possible impact investing opportunities for us to invest in.

Over the next year, we also intend to develop an impact framework for the organisation through which the difference we are making can be measured and reported on externally. This will also be helpful in supporting the reporting we already do for the various accreditations, or similar, that we are already signed up to, like the Funder Commitment on Climate Change or IVAR's Open and Trusting Grantmaking Pledge. We will also be publishing the findings from the latest phase of our History Project, which relates to a team of researchers we commissioned back in November 2021 to explore the origins of our wealth and the people linked to it, namely our founder, his father and his sister. Late last year, we held a deep dive discussion on our time horizon as an organisation, and we will share where we have got to on this as well.

John Ellerman Foundation has been committed to being an outward-facing organisation for some years now, and this year will be no different. We know that it is by working together with others that we can deliver our operational and strategic ambitions successfully. We will always take a values-led approach to the work we do with others, which for us means applying a personal touch and being discerning, responsive, flexible and connected. With a new Trustee joining us soon (more on that in February) and six staff still settling in and getting to know each other and the way the organisation works, these values matter more than ever.

I've spent a lot of this month reflecting on the word 'busy'. It's a word that's been used often by members of our new team and in conversations with colleagues from other organisations too. That's not all that surprising I guess, especially given that this month the term 'polycrisis' seems to have entered our everyday lexicon too. I'm not sure that busy exactly describes how I have been feeling this month, even on the days where I have been organising my time so that every single minute is accounted for. Instead I would say that I have been feeling energised. It's hard not to be! This last month I have been in the privileged position of working with my new team to consider what currently is at John Ellerman Foundation, and together we have been imagining what will be.