

PUTTING VALUES INTO ACTION



Dame Sara Llewellyn, chief executive of the Barrow Cadbury Trust, talks teenage activism, Quaker values and the lighter moments of lockdown.
By Sarah Myers.

My commitment to social justice started at a young age and has been a vital part of my life view ever since. It's partly motivated by my upbringing. I was raised by atheists and in the Judeo-Christian tradition, which is a very liberating combination from a values point of view. My father was a very early adopter feminist. I was a teenage lesbian, very interested in feminism but also in the Black Panther and Black Power movements, which heavily influenced me.

I believe you can follow the values of social justice into many careers. There are fantastic values-driven people in the corporate sector and the state sector. We've got to learn to accommodate those different perspectives in the charity sector, without being snuffy about being better than other people – particularly on things like diversity, equity and inclusion (DEI). The corporate sector is now ahead of us on DEI, even though we 'invented' it.

I trained as a secondary school teacher. But my activism led me to a paid role in Women's Aid, managing refugees in South London. By definition, that's about homelessness and I got hooked on housing and homelessness policy. That's how I became involved in St Giles Trust, a charity which tackles social inequality. I became the chief executive when I was 34. I moved the organisation on from working out of the crypt at St Giles Church to become a multipurpose service in Camberwell.

Your learning curve is extremely steep when you redevelop something, grow it and diversify it. It's incredibly exciting. But you reach a point where the learning curve shallows, and the workload just continues to be more and more onerous. At that point, I stepped out for a bit and went freelance as a consultant, before joining City Bridge Trust. I was there for 10 years and then moved on to the Barrow Cadbury Trust.

I'd been developing my CV through senior governance positions. I was chair of the National Lottery Awards for All, vice chair of what is now the National Lottery Community Fund, on the Futurebuilders investment committee, and chair of London Funders. I was also vice chair of ACF for six years and I've just finished my nine-year stint as a board member of Charity Bank. My knowledge of social investment was partly why I was appointed to the Barrow Cadbury Trust, as they wanted to get involved in that area.

WHAT GUIDES OUR WORK

At Barrow Cadbury, we don't think of ourselves as primarily or only a grant-maker, we think of ourselves as a change maker working with partners. Of course, giving grants is an absolutely key part of the privilege of being an endowed foundation. But we're not generalists, we don't pick and choose the projects that sound best from a wide variety and

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fund them. The way we work, the money follows the strategy. We think of the money merely as the lubricant to the end goals. We have a number of programmes which are long term, 10 to 15 years at a time. We're working with external partners building ecologies in particular fields, focusing on changing things through policy, advocacy, campaigning and lived experience.

Our Quaker roots guide our work at Barrow Cadbury. They're our North Star. Although I'm not a Quaker, my values mirror Quaker values. I've always said if I was a theist, I'd be a Quaker. It's a



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consistent and enduring value base. We all have the Quaker social justice value base written into our job descriptions. And we wouldn't appoint anyone who couldn't explain to us what that value base means to them in their lives. We don't mean 'Can you answer a clever question about inequalities?' Rather, 'How does social justice manifest in the way you live your life?' Because we are what we do – both ideologically and practically. It stands us in such good stead, because it's the bedrock of the trust between us all.

We're still majority family governed. Before joining the board, younger family members must serve an apprenticeship of at least a year, shadowing a frontline third sector organisation's board. I introduced that. I was a bit nervous about suggesting it, but trustees thought it was a really good idea. At Barrow Cadbury we're actors in civil society, we don't just support it. We have our own charitable objects as all charities do. Our board is the custodian of the money that Barrow and Geraldine Cadbury put in trust for public benefit 101 years ago. It's our responsibility to spend that money as carefully and wisely for social justice as we can.

LOCKDOWN LESSONS

Organisations are not resilient if their governance is poor. That's a key red flag.

If your governance, or that of any of your partners, is weak, your priority must be to help strengthen it. Accountability, transparency and strategic direction are all critical to enabling people to get on with their job. The jewel within that, for me, is values alignment. When you have strong and supportive governance and values alignment – with the expectation that people in the organisation live those values – then you're much less likely to get into big trouble.

In the past year, everyone at Barrow Cadbury has stepped up and done things outside of their comfort zone and job description. We delivered £5m in funding from the National Lottery Community Fund at breakneck speed to the refugee and migrant sector. That had every one of us getting in there to make sure it was done well and on time. And it was a fantastic and humbling experience for us all. The by-product for some junior members of staff is that they have new skills to add to their CVs.

We've learnt some important lessons. For example, we'd assumed that operational staff always had to be in the office. We now know that most people can do the majority of their work remotely. The issue here is about trust. You have to trust that people are doing what needs to be done. Of course, in an organisation that works at a very

relational level, there's always going to be a need to have face-to-face contact. We're definitely not going to move to everyone working from home all the time. But there's no need for everybody to travel in to the office every day.

We mustn't be coy about the fact that having £100m behind us means we're a lot more protected than most of our partners. It would be disingenuous not to acknowledge that. Like many trusts and foundations, we've worked closely with our partners to help shore them up. As well as financial support, we've been repurposing what money was ring-fenced for and extending reporting deadlines. We've shared resources and materials, for example around HR policies and safeguarding. Our communications team has been putting together funding briefings every fortnight, signposting to what's available, so smaller charities don't have to do the legwork.

There have been lighter moments over the last year, too. During lockdown, we put together a book of our staff's favourite recipes and a playlist of our favourite songs. We had 'lockdown bingo', which was hilarious. It turns out everybody's clothes have been shrinking in the washing machine over the past year too...



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LOOKING FORWARD

I was completely gobsmacked to receive the damehood and thrilled to be recognised. There’s a lot of luck in it, of course. That’s not to say I haven’t made a contribution. I know I have, on a number of fronts. When it was announced, I received a letter from a woman who ran the community nursery that our children went to, and that I was on the board of for 20 years. She’s 80 now and wrote to tell me she remembered how much money I’d raised for the community centre and how much time I’d put in as a volunteer. I think that letter meant as much to me as any of the glittery, public eye aspects of the damehood.

If you want to make structural change, which is what I’ve wanted to do all my life, you can’t do it on your own – and you’d be foolish to try. That’s what we always say at Barrow Cadbury. The damehood is one for the team, and for all the people I’ve worked with over so many years.

When it comes to looking to the future, I’m with Karl Popper: I believe optimism is a moral duty. Of course, there are lots of problems ahead. We’re going to wake up to the biggest financial hangover. And there are plenty of unknowns. But what we can take comfort from is that we’ve seen the mobilisation of tens of thousands of young people who’d never done any community volunteering before. They just stood up and said, ‘Yes, I’m in. I can get on my bike and take medicines and food round to vulnerable people in my neighbourhood’.

Huge numbers of young people have gained a deeper understanding of how racism operates. And that’s a really good thing. They’re also starting to call the older generation to account for not having moved quickly enough on climate change. We’ve got big, big challenges ahead. But I believe the

negative behaviours are a minority sport. What matters most is that so many more young people are getting engaged in important social issues. I don’t think that genie can be put back in the bottle. ●



Photo: Cyril Marcihacy

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RISING TO THE CLIMATE CHALLENGE

ACF and official partner Mercer hosted a roundtable for foundation and university investors to compare experiences. Here’s a snapshot of the discussion that took place.

To start off the discussion, participants considered what pressure universities and foundations face in relation to the climate crisis and their investments.

Professor Nalin Thakkar, professor of Molecular Pathology and vice-president for social responsibility on the board of governors at the University of Manchester: “For us, the pressure comes from all our stakeholders – students, staff and alumni. Students are the primary drivers, they’ve occupied buildings because they wanted us to divest from fossil fuels. However, we also work with petroleum companies in our research and sponsoring students so we have to balance relationships.”

Gareth Donegan, director at Mercer: “Universities are being ranked by student groups on how they’re tackling climate change in their investments¹. What we find working with universities is that students are taking sustainability issues into account when choosing a university.”

Mark O’Kelly, head of finance and resources at Barrow Cadbury Trust: “For foundations, pressure is internal. Staff and trustees want to use all our assets to achieve our mission. There isn’t competition between foundations, we’re all pushing each other to move in the right direction.”

Sufina Ahmad, director at John Ellerman Foundation: “I agree, foundations aren’t typically public-

facing institutions. Many foundations are exploring the origins of their wealth. By understanding where money came from and how it is sustained through investments, we’re looking to find anything that contradicts the good we’re doing in our grant-making.”

James Brooke Turner, investment director at Nuffield Foundation: “Our mission is to get people to develop policies based on evidence. We’re uncomfortable with the pressure of moral outrage – as an endowment we can take our time and deal with it our own way. We also don’t see beneficiaries turning money away yet. What is of most interest is being able to recruit high-quality staff and what you’re doing in terms of climate change is important for that.”

DIVESTMENT OR ENGAGEMENT?

The group explored engagement (where shareholders engage with a company directly or through their investment managers to improve corporate behaviours) and divestment (where shareholders sell their holding to demonstrate that they are unhappy with a company’s behaviour).

Professor Nalin Thakkar: “With divestment you’re only looking at Scope 1 and 2 carbon emissions. We decided to include Scope 3 emissions² and Mercer were very helpful in this regard. The city of Manchester’s target is zero carbon by 2038 so we will get our whole portfolio, not just the fossil fuel companies, to zero

carbon. We have always had student representation on our investment sub-committee and it can be challenging to avoid a push for blanket divestment and maintain focus on the whole portfolio.”

Vanessa Hodge, sustainability integration lead at Mercer: “I agree, for universities there is a danger stakeholders don’t fully understand investing. It’s important for asset owners to think broadly about and try to balance environmental, social and governance (ESG) factors – for example thinking about the social impact of a divestment decision such as inadvertently creating job losses. Examples of engagement by foundation or university investors are valuable, by divesting you lose your seat at the table and can’t help make change.”

Mark O’Kelly: “We want to invest in companies that have strategies aligned with the Paris Climate Agreement. Where they’re not aligning, we work with other investors and investment managers to persuade them. If they don’t improve, we divest. Interestingly, Cambridge University took the decision to divest and produced a detailed report on that decision³. They felt the publicity they generated by divesting would have an impact.”

Sufina Ahmad: “At John Ellerman Foundation, we believe there is value to divesting and to engaging. Companies that are high polluters have ignored shareholders arguing for better. It’s easy for investment specialists to say that non-specialists don’t understand what value

¹ carbontargets.uk

² carbontrust.com/resources/briefing-what-are-scope-3-emissions

³ cam.ac.uk/sites/www.cam.ac.uk/files/sm6_divestment_report.pdf