

The Baring Foundation

Place-based funding – developing the ecology of the social sector

Margaret Bolton, April 2015

Foreword

This report is based on scoping research conducted for the Baring Foundation to inform the development of its Strengthening the Voluntary Sector (STVS) programme.

The research was originally used to consider whether the Baring Foundation might adopt a specific geographic focus that aimed to develop the ecology of voluntary sector organisations in a city or region. Ultimately, the Baring Foundation decided that adopting a place-based approach was not the right fit for the STVS programme. Instead, the STVS programme will focus on encouraging and developing the use of the law and human rights as tools of social change for the voluntary sector.

However, we do recognise the potential of foundations adopting place-based approaches. We also agree with Margaret's conclusion that support for local infrastructure needs to evolve and increase, if we want to preserve and develop a vibrant and sustainable voluntary sector at the local level.

This paper outlines the original research for a wider audience, in the hope that it can inform the debate on local infrastructure and the role that foundations can play.

We are very grateful to Margaret for her hard work, valuable research and the compelling case she makes for supporting community anchors.

David Sampson
Deputy Director
The Baring Foundation

Introduction

The original report was designed to support the Baring Foundation's decision making and was tailored to an internal audience. While this new report aims to be of general interest, readers should bear in mind that the research was conducted with a particular lens used to view place-based funding, namely how strong voluntary or social sector ecologies might be developed in particular local areas. (The box below provides a discussion of the term ecology and its meaning in this context).

This report suggests that the indications are that place-based funding which achieves beneficial change appears to be rooted, amongst other things, in supporting the development of strong community-level leadership and infrastructure. However, this is only one strand of a potentially many-stranded dialogue about place-based funding and how it can best contribute to creating positive change in local areas.

Research for this report comprised a series of interviews with experts (Annex 1 provides details) and desk-based research (Annex 2 contains a bibliography). Crucially, it has also been informed by extremely helpful discussions with David Sampson and David Cutler from the Baring Foundation while the research was underway.

Use of the term ecology

Ecology is the analysis and study of interactions amongst organisms and their environment¹. Topics of focus include diversity, competition within and amongst different systems, and adaptability i.e., how organisms respond to environmental change and life processes.

There are different sorts of ecological study including those focused on the natural environment, human development and the urban landscape. Urban ecology, for example, is the study of the relationships between different organisms and their relationships with their urban surroundings.

The concept of ecology has been applied in a voluntary sector context before. Examples include work by Mission, Models, Money on the ecology of arts and cultural organisations² and discussion amongst funders, particularly trusts and foundations, on the ecology of funding and financing for social change³. Others are developing work on the social ecology of an area, focused on individuals and communities⁴, and on ecosystems for social innovation, incorporating voluntary, public and private sector organisations⁵.

An ecological study of voluntary organisations in a particular area, a city or region for example, might be concerned with a broad number of issues and questions including:

¹ Biology on line.

² Mission, models, money, *Developing a healthy ecology of arts and culture* (MMM, May 2007).

³ Henry Kippen, *Supporting Social Change: A New Funding Ecology* (Collaborate, 2015).

⁴ David Wilcox, Social Reporter

⁵ Tim Draimin, Social Innovation Generator, which is based in Canada.

Is there a diversity of voluntary organisations? Are small and niche organisations, which represent community needs and interests, prospering or struggling?
Are voluntary organisations in the area adaptable and resilient? If not, what do they need in order to make them so?
Are organisations well networked? Is there a sense of common purpose and strong collaborative working to address local needs and issues? Are the large supporting the small?
Is the system as a whole strong? Are all the organisations in it (infrastructure or support bodies and the independent funders) playing their part in making it resilient?
How does it relate to other systems i.e. the public and the private sector? Are all available resources being mobilised to best effect?

Section 1: A note on background and context

There is considerable experience in place-based funding amongst foundations in the UK. Many have a strong geographical focus related to the financial or other interests of the founder. There are 48 community foundations across the UK which give locally. In addition, a number of foundations with a national remit choose to focus investment in one or more local areas.

The Big Lottery Fund has also supported place-based programmes. An example from the past is the Fairshares initiative delivered by Community Foundations UK. A current example is Big Local. Government has also delivered neighbourhood regeneration programmes such as New Deal for Communities and Communities First (which was managed by the Community Development Association). While there is doubtless much to learn from these initiatives this report focuses on place-based funding by foundations.

There is increasing interest amongst UK-based foundations in how best to deliver place-based funding. ACF is convening a group of interested foundations to discuss the issue. IVAR is just beginning research on place-based or locality funding supported by a small clutch of foundations, while a small group of foundations have also recently launched a collaborative initiative to support the development of preventative approaches to difficult social problems which has a locality focus. The Big Lottery Fund is also partnering in this initiative.

In the U.S., interest in analysing and better understanding place-based funding has burgeoned over the last couple of years, spawning a number of review and analysis projects (described in the box below). The literature emerging from these projects provides a rich vein of commentary based on research examining practice and the testimony of experts. This report draws on the material some of these initiatives have already published.

U.S. Research and Analysis Initiatives 2014/2015

The Centre on Philanthropy and Public Policy at USC - an inquiry into place-based funding.

GEO (Grantmakers for Effective Organisations) - an initiative, *Place-Based Evaluation: A Community of Practice*.

The Urban Institute - an analytical review of the history of place-based work and its prospects for the future.

The Aspen Institute's Forum for Community Solutions and Neighbourhood Funders Group – *Towards a Better Place*, which sought to spark conversation about promising practice in place-based philanthropy.

The Aspen Forum for Community Solutions and FSG - a group of funders came together to discuss the theme of collective impact for place-based initiatives.

Section 2: Place-based - the role of the voluntary sector

The context was described by the experts interviewed to inform this report. They gave their perceptions of the impact cuts in public spending are having at the local level. The picture they painted was one of:

- increasing poverty and disadvantage, as evidenced, for example, by the growth in food banks;
- cuts in community-based services which have tended to impact most on the disadvantaged and vulnerable;
- more generally the loss of voluntary sector services and support and, in particular, cuts in the funding of voluntary and community sector infrastructure;
- greater competition between voluntary organisations leading in some areas to a reduced focus on community needs and how best to meet them;
- voluntary organisations not investing in research and development which will “hollow out” the sector and make it less resilient in the future; and,
- the voice function, particularly in relation to public service delivery, suffering as a result of funding cuts.

This implies that a foundation's interest in place is inextricably linked to an interest in the health and vitality of the local voluntary and community sector ecology. While it could be argued that this link is defined by the eligibility criteria of the majority of foundations, there is a hypothesis that developing the voluntary and community sector in a local area will make an important difference to the quality of life of local people.

Notably, the experts suggested that we lack the hard evidence to support the

hypothesis that efforts to strengthen the voluntary and community sector in a particular area will improve the quality of life of local people. Notwithstanding this objection, we believe it is, nonetheless, a valid theoretical assumption based on our understanding of typical characteristics of voluntary and community organisations i.e., that they:

- tend to be set up as a response to market failure because provision is absent, inappropriate or too expensive;
- tend to be set up by people with a passionate commitment to particular issues or causes based on direct experience;
- often adopt the role of community champions or advocates, giving a voice to people who would otherwise be unheard; and
- can act as brokers or mediators breaking down silos and bringing different sectors together, thereby helping to coordinate local action.

While we do not have evidence to prove the positive hypothesis outlined above, the experts we interviewed reported a correlation between disadvantaged communities and poor voluntary sector infrastructure.

One crucial point made by the experts interviewed was that it may be more fruitful to focus on the wider social sector ecology as opposed to the voluntary and community sector ecology on the basis that creating positive change in local communities means working across different functional areas (health, social care, employment and training, etc.) and across the different sectors (voluntary, public and private).

In a context in which cash is scarce, the ‘new normal’ as some call it, the imperative is to mobilise and make the most of all available local resources. It should be noted, however, that the interviews with experts provided examples of voluntary and community sector infrastructure organisations taking the initiative either to broker relationships between different sectors and services to the benefit of local people or develop initiatives aimed at leveraging investment into under-invested areas (discussed further later) and it might be argued that the best of them are singularly well placed to do so. This is a theme of the report of the recent Commission on the Future of Voluntary Sector Infrastructure (see the box below).

Commission on the Future of Local Voluntary Sector Infrastructure

The Commission on the future of local voluntary sector infrastructure chaired by Sara Llewellyn published its report *Change for Good* in January 2015. The report:

- considers a redefined role for local voluntary sector infrastructure as convenors, helping ensure that the best use is made of the resources available locally and supporting/enabling local communities, particularly those who are most disadvantaged or discriminated against, to meet their needs;
- places an emphasis on the role such organisations can play in leveraging resources into local areas, developing local economies based on resource sharing and gifts of time as well as money;

- stresses the potential of private sector partnership/support;
- recommends that the Big Lottery Fund should extend the support to local voluntary sector infrastructure provided through its Big Assist programme; and,
- makes a number of recommendations to independent and statutory sector funders about support for local voluntary sector infrastructure including through funder collaborations.

Section 3: Key characteristics of place-based funding

A number of different terms are used in the literature to describe geographically-based funding. The term place-based appears to have currency in the U.S. and is increasingly being used by foundations in the UK.

Place-based funding can simply mean that funding is concentrated in a particular geographical area or it can describe something more fundamental about the approach adopted. A U.S. commentator on community-based philanthropy, Janis Forster Richardson, provides the following definition of place-based funding:

A place-based funder has an intimate tie to a particular place that you can find on a map, and is focusing their work in that place with the people who live there and the organisations and institutions that are highly invested in that place. A place-based funder uses a wide-angle, multi-faceted lens in work that is about community resilience and vitality. They may work on one problem or issue at a time, but do so with respect for local history and culture, a commitment to identifying and mobilising local assets, and an interest in building local capacity to weather the next storm.

(see the box below for a summary of her longer commentary).

The commentary that Janis Forster Richardson provides on place-based funding is notable because it:

- characterises such work as aiming to increase resilience in communities;
- is about funders acting as catalysts or convenors supporting the change that local people aspire to but need support to achieve; and,
- illustrates that the funding provided can have a generic purpose; for example, improving quality of life in a particular area or a more specific purpose such as reducing poverty or giving children a better start in life.

The U.S. literature provides a well developed analysis of place-based funding. It distinguishes different iterations of place-based funding and describes their particular features; for example, ‘embedded philanthropy’. This is described as:

- Exhibiting a commitment to a particular community or communities over time (generally defined by a particular geography but perhaps more loosely – see discussion about defining areas of benefit below).
- Exhibiting a commitment to community engagement and developing relationships with a range of community actors.
- Emphasising relationships which are not incidental but the key means by which these foundations work.
- Being based on much more than grant making. For example, modest grants are combined with technical assistance.

Meanwhile foundations regarded as successfully delivering such initiatives are regarded as having a high tolerance for uncertainty, an emphasis on respect and reciprocity in their approach to communities and a willingness to sacrifice power.

Other examples of place-based funding discussed in the U.S. literature are community change initiatives or CCIs. The additional feature which appears to distinguish these from “embedded philanthropy,” is their explicit concern with systems change. This concern manifests itself in a number of ways. A particular community is regarded as a system and an emphasis is placed on understanding the interconnections and interdependencies of the individuals and organisations within it. The system is the public, private and voluntary sector institutions serving a particular geographical area and the support they provide to communities. The system comprises, too, the institutions which have a larger geographical span than the locality concerned but whose policies and practices impact on those living in the locality and their quality of life and life chances.

Wanting more from place-based

Isn't it true that some think of their geographies as service areas for the organisations that are eligible to receive their grants, where others think of their geographies as multi-dimensional systems, within which non-profits are just one moving piece?...

I want to know how a community is functioning, what draws people there and compels them to invest their time and passion to make the community better. I want to know what is holding the community (and the people who live there) back, what is making it vulnerable, what is pushing people to the edge and making them feel like strangers in their own community. I want to know why some communities are places where people are quick to act, and some communities are places where people wait for someone else to fix what is broken. I want to know about the community's infrastructure - the skeleton formed by local policies, local relationships, and local culture that enables a community to deal with the little things and the big things. I want questions like these to be the basis for a place-based funder's work, with "place" in all of its dimensions on the table...

I want more recognition that you can't be a hands-off funder in a place-based world. I want to see that you are seeking relationships with the people in your place as active

citizens rather than passive players or problems to be fixed through professionalised services. Somewhere in your bag of tricks, I want to see work that builds meaningful relationships with people who are traditionally not at the strategy table, and I want to see grants that reach beyond the professional grant seekers and go all the way to the block level. Somewhere in your strategy for change, I want to see that you're clear that you can't be place-based without having the people who live in that place squarely in the middle of that picture.

Janis Forster Richardson

<http://www.janisforster.com/2009/08/wanting-more-from-place-based.html>

Section 4: Place-based funding - issues and challenges

The literature indicates that place-based funding poses a number of issues and challenges for foundations. These include:

A challenge to traditional philanthropic approaches

The view is that effective place-based models of working require the funder to provide much more than money. They require the funder to act as a negotiator, broker or convenor. Place-based funding at its best is regarded as focused on developing strong relationships (see the box below *More than money* and the box on page 8 which describes JRF's place-based work).

More than money

Regardless of whether monetary grants are part of an embedded funder's approach—for most they are, but not for all—there is a good deal more to their community engagement and change efforts than grant-making. Some focus on convening a variety of community actors and interests, providing space for new conversations, and helping all parties “get a place at the table.” Others intervene more aggressively, incubating community-based organizations, nurturing local leadership, catalyzing new processes of community mobilization, or brokering their relationships with institutions and political actors to make change. Some take on the role of providing data and information on community issues, developing research or publicity functions. Many conceive of grant-making as an important but ultimately subordinate tool—“as embedded funders,” says one foundation director, “money may be our least potent instrument for change; it's really just an entry-point.” Another says, “money is like gasoline, if you pour it on the ground, or put it in a car without an engine, it doesn't make any difference.”

Extract from Mikael Karlström, Prudence Brown, Robert Chaskin and Harold Richman's *Embedded Philanthropy and Community Change* (Issue Brief, April 2007, Chapin Hall, University of Chicago).

A challenge to the usual power dynamic

One funder at a U.S. symposium on place-based funding said that foundations are “on shaky ground if they name a problem for the community or name a solution”⁶. The ethos of much place-based funding is that local communities should be supported both to identify the issues and to propose and own the solutions.

Defining the community of benefit

Some foundations have a strong tie to particular localities. They are founded with a clear geographical focus (for example, the Northern Rock Foundation – see box below). Others decide to work in particular localities for discrete policy reasons (for example, JRF – see the box below). When foundations choose to adopt a place-based approach they have to address a number of related questions about the community of benefit:

- how to choose the communities with which they will work (i.e., based on deprivation indices);
- what constitutes a sensible focus, regional, city-wide or more local;
- should the emphasis be on areas with the least resources or capacity or on areas in which there are solid foundations on which to build?

Building capacity

One of the key lessons learned from the literature is the importance of building community capacity in order to achieve successful implementation. While central government may be interested in developing particular functional capacities; for example, in the delivery of employment training schemes, foundations and other independent funders are regarded as having a particularly important and valuable role to play in developing generic capacity in the community and voluntary sector, supporting its responsiveness to local needs and issues.

Institution building

Another lesson learned is the value and importance of building the capacity of existing functional voluntary and community sector infrastructure organisations to deliver as opposed to seeding new institutions or foundation staff doing the work themselves. (See also the box below describing learning from the Northern Rock Foundation).

Creating change

There is a recognition in the U.S. literature that in order to make a significant difference in the lives of disadvantaged or discriminated against communities that work needs to be undertaken at two levels, within the community and, also, in parallel,

⁶ The Aspen Institute Round Table of Community Change, *Lessons from the Field III – Implications for Place Based Giving* (Transcript from Council on Foundation Annual Conference 2011)

at the level of policy and systems change. Local advocacy and campaigning help to maximise the impact of this work whilst also providing a catalyst for community engagement.

Learning from the experience of UK-based foundations

Northern Rock Foundation

A recent report: *Being There, Northern Rock Foundation's Approach to Resourcing Grant Making* examines Northern Rock's (NRF) funding over seventeen years in the Tees Valley and Tyne and Wear. It describes NRF's approach and its hallmarks. It identifies the key challenge for NRF as: how can judgements about who, what and where to invest be as grounded, informed and legitimate as possible?

The NRF report stresses the value of proximity and local knowledge in building trust and making cross-sectoral connections, and the value of long-term engagement in creating change at the local level. It characterises NRF's approach as both place based and specialist as it developed programmes on themes such as domestic violence and dementia.

The report includes a section on learning for other funders including:

[national funders should consider] what might be needed... in terms of a local or expert partner who can bring a depth of local knowledge and breadth of networks and the ability to identify less well-known organisations which might be more effective than better-known peers. This can avert the danger of parachuting in or imposing strategies from outside that risk being at odds with the reality on the ground.

Joseph Rowntree Foundation

Based in York, JRF wanted to gain sharper insights into a range of social policy issues by extending its work into a city with greater diversity and deprivation. Bradford's economic and ethnic profile provided a clear contrast and, importantly, the local authority was open to a partnership. Last year JRF published a report which summarises two independent reviews of its ten-year programme of support in Bradford (*What Makes Effective Place-based Working? Lessons from JRF's Bradford Programme*). These reviews highlight the challenges for other funders considering "place-based" approaches; the report suggests that the biggest is recognising that you won't be able to do everything that all the stakeholders in a place want you to do.

The report concludes that, despite a number of successes, stakeholders considered that the programme had not had a long-term impact on Bradford. JRF's learning from the programme is that it should have:

- been more strategic and clearer about the programme's purpose;
- involved local stakeholders in the design of the programme and its projects;
- translated more research into practical action;
- worked with broader networks and partners;
- communicated more, both throughout projects and in disseminating

findings; and,
- stuck with projects rather than moving on to new work.

The two reviews found JRF was most successful acting as an 'honest broker'. They recommend that its role, as the programme draws to a close, should become to facilitate, influence and enable partners to take action as a result of its research activities.

Section 5: An identified need - support for community anchors

The research on which this report is based sought to canvass views on funding needs relevant to the question being considered: whether the Baring Foundation might adopt a specific geographic focus with the aim of developing the ecology of voluntary sector organisations in a city or region. The overall objective being to increase the quality of life and improve the prospects of people suffering disadvantage and discrimination.

Some of the experts interviewed suggested that the emphasis should be on developing stronger systems of support amongst all the institutional actors whose decisions and operations impact on the quality of life and life chances of local people. The strongest message emerging from the interviews was the need to support capacity for convening and collaboration to ensure the best use of scarce resources and potentially reduce the impact of cuts in public spending.

The interviewees referred to the need for support for voluntary organisations, at a local level, to variously:

- work together, the large with the small, to address community needs;
- work with the public and the private sectors to ensure the best use of and sharing of resources;
- act as catalysts for the development of support for the most vulnerable;
- develop projects to lever additional resources into areas;
- come together, the large and small, to deliver contracts and positively influence public service delivery;
- support communities in identifying their assets and deploying them;
- focus on the health service and demonstrate the value of preventative work in tackling health inequalities;
- market build by demonstrating how the voluntary sector can help the public sector achieve the outcomes it needs to achieve, particularly, perhaps, in the field of public health;
- develop a better understanding of the voluntary sector/social sector ecology; and,
- have a stronger voice (particularly with regard to public service delivery).

The suggestion was that funds might be provided to enable the voluntary sector to focus on needs or issues not currently recognised or not given sufficient attention by the statutory sector and to help to give voice to the voluntary sector in advocating for these needs.

There was also a view that strong community anchor organisations (defined broadly so as to encompass CVS, development trusts, community foundations, local housing associations, residents associations, settlements, etc.), at their best, are the organisations that can act most effectively as local convenors and catalysts for change (see the box below).

Community anchors

The Home Office Civil Renewal Unit's framework for community capacity building titled *Firm Foundations* (2004), defined community anchor organisations as having at least four common features: they are controlled by local residents and/or representatives of local groups; they address the needs of their area in a multi-purpose, holistic way; they are committed to the involvement of all sections of their community, including marginalised groups, and they facilitate the development of the communities in their area.

The Community Alliance widened the definition and described community anchors as independent community-led organisations which *are multi-purpose and provide holistic solutions to local problems and challenges, bringing out the best in people and agencies. They are there for the long term, not just the quick fix. Community anchors are often the driving force in community renewal.*

The Lankelly Chase Foundation, for example, whose core mission is to tackle multiple disadvantage, views community anchors as 'key nodal points' and agents to create the systems change needed at a local level to improve quality of life for those experiencing multiple disadvantage:

given that these organisations are often (but certainly not always) both multi-purpose and operating according to co-production principles... they are very well-placed to foster networks across voluntary, statutory and private sectors, as they are often the sole organisations locally engaged with all three.

Our purpose is to view organisations as part of one interacting and morphing system that is impacting on families, communities and individuals, and our current sense is that you need a 'backbone' organisation to create the right space in which an equality of exchange between various people and organisations in that system can be effected.

While there is little hard evidence of the contribution that community anchors can make, they have been identified as making the following contributions in *Anchors of tomorrow – a vision of community organisations for the future* (Community Alliance, 2009):

- influencing service providers and giving them a local point of reference - essential for organising effective policing, housing management, and youth work;

- identifying opportunities and developing complementary community-based services;
- helping build new governance arrangements - essential to resolve problems, broker different needs, make decisions and develop some coherence in the way the community operates;
- supporting other community associations that reflect the diversity of the community and provide voice and influence in different ways; and,
- providing a launch pad for enterprise, a custodian of community assets and a guardian of local quality of life.

The Development Trusts Association Scotland says that:

an examination of the characteristics of strong and independent communities shows that they possess the ability to unite - and `hold together` - usually around some local organisation which they own.....There are no examples of sustained community empowerment without some such locally embedded organisation [championing the interests of the local community sector] although in some areas this leadership role is achieved by two or more groups acting together.

Further, it suggests that “experience has shown that, without reference to some independent local organisation, community representatives are too isolated to be effective”.

The research therefore suggests a need to provide support to community anchors to enable them to act as catalysts to encourage better use of community, public and private sector resources in order to try to minimise the impact of spending cuts. It also suggests that there should be a strong research and evaluation component to this work in order to develop:

- a stronger research base on the value of community anchors and their role in addressing disadvantage and discrimination;
- a stronger research base on models of cross-sectoral collaboration and its value; and,
- a series of case studies illustrating the value and importance of independent action and voice in the local voluntary sector.

As indicated earlier, while a number of different types of organisation can operate as community anchors (community foundations, settlements, etc.) this work might build on the interest and commitment in the CVS movement to better support communities in the context of the even deeper public spending cuts to come (see the box above about the Commission on the Future of Local Voluntary Sector Infrastructure).

Summary

There is a need to provide support to community anchors to bring institutions and individuals in their local area together to more effectively tackle disadvantage and discrimination. The overall objective would be to secure better services and support for people suffering disadvantage and discrimination and to leave a sustainable

legacy as regards improvements in quality of life and life chances as well as, a stronger evidence base on the value of local voluntary and community sector infrastructure.

Annex 1 Expert interviewees

1. Karl Wilding - NCVO
2. David Robinson - Community Links
3. Duncan Scrubsdale –Lloyds Foundation
4. Neil Cleeverly – NAVCA
5. Jon Fox - Big Lottery Fund
6. Steve Phaure – Croydon CVS
7. Steve Wyler - ex CEO of Locality
8. Mubin Haq – Trust for London
9. Debbie Pippard – Barrow Cadbury Trust
10. Rob Williamson – Tyne and Wear Foundation
11. Joanna Holmes – Barton Hill Settlement
12. Geraldine Blake – Community Links
13. Ben Cairns - IVAR
14. Christopher Graves – Tudor Trust
15. Judy Robinson – Involve, Yorkshire and Humber
16. Angela White - Sefton CVS,
17. Mel Bonney Kane - CaVCA in Scarborough
18. Jake Ferguson - Hackney CVS,
19. Jo Curry - VONNE in Newcastle
20. Mark Law - Barca
21. Jeremy Swain - Thamesreach
22. Neil Berry - Locality
23. John Mohan – Third Sector Research Centre
24. Dan Paskins – Big Lottery Fund
25. Sara Lewellin – Barrow Cadbury Trust
26. Jane Leek – Porticus Foundation
27. Julian Corner - Lankelly Chase Foundation (provided valuable input over email).

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