

Q&A on Esmée's strategy and how we make decisions

Webinar, 14 January 2021, 11.00-12.30pm

Thanks for joining us, the webinar will commence shortly.

Agenda

11:00am **Esmée's new strategy & direction: what we want to achieve** – Caroline Mason, Chief Executive

Our support:

- What we're looking to support, what we're not, and how we make decisions – Sharon Shea, Director of Portfolio
- Social investment – Ben Smith, Head of Social Investment
- Tools beyond our funding – Shemain Wahab, Tools Manager

Q&A

Facilitator: Hannah Lim, Funding Manager – Social Change Lead

11:40am **Break**

11:50am **Workshops taking a closer look at our impact goals & priorities under each aim:**

1. Our Natural World
2. A Fairer Future
3. Creative, Confident Communities

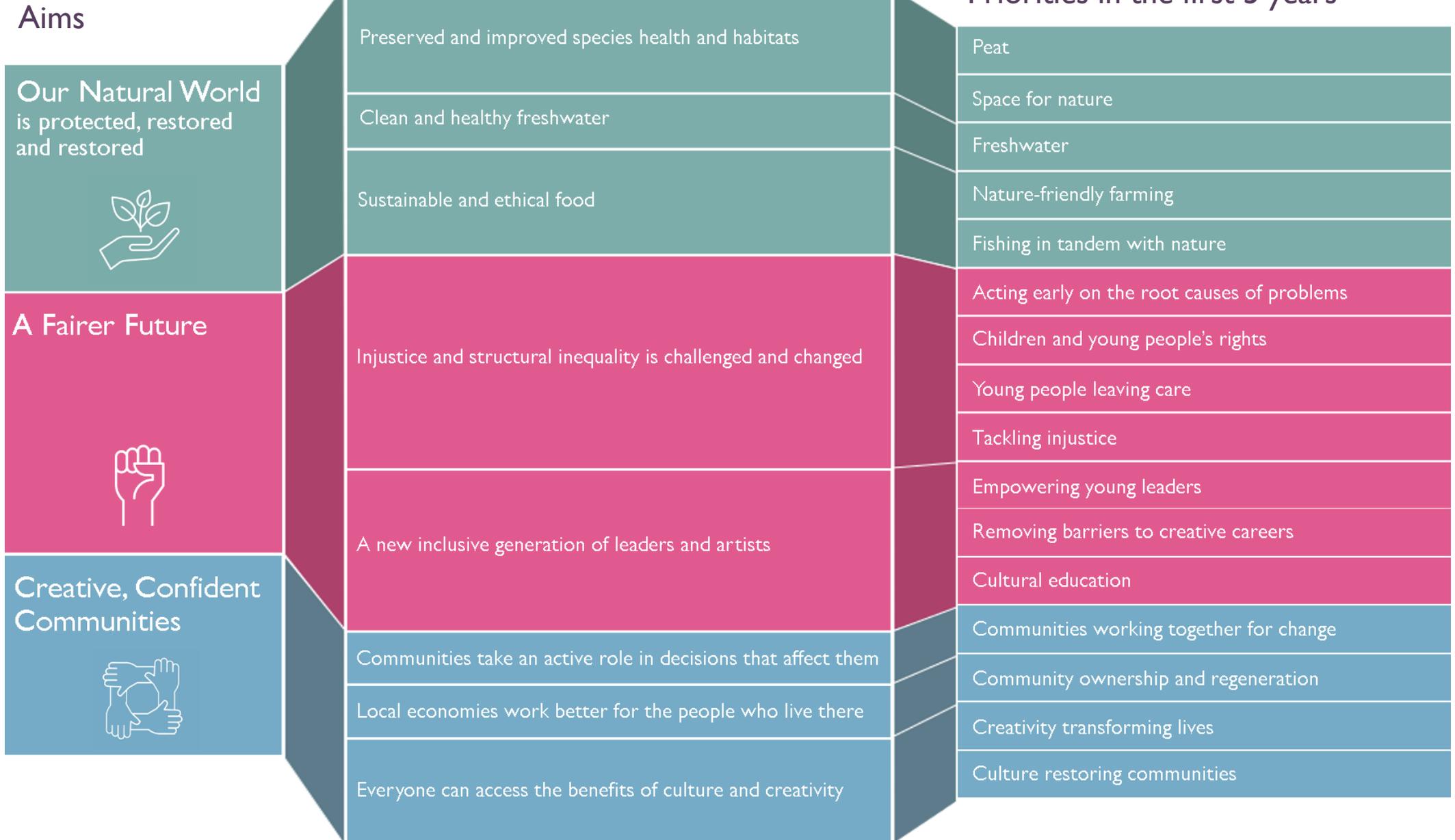
Each workshop will have 10-15 mins for an overview of the impact goals and our priorities from our Funding Team, followed by a Q&A. All the sessions will be recorded.

12:30pm **Event ends**

Strategic framework

Impact goals by 2030

Priorities in the first 5 years



What we're looking for

- **Unusual collaborations and ambitious partnerships** - delivering at scale and involving or engaging a range of charity, public sector or corporate stakeholders
- Work which makes **connections across our aims**
- **Communities or people most affected involved in leading change**
- Work which uses a **preventative approach**
- Work that has practical plans to achieve and **sustain change over the long-term**

We won't support work unless it's...

- Leading the way or part of a partnership or collaboration aiming for transformative change.
- Pioneering by breaking new ground, or using tried and tested models to push things forward in a new way.
- Ambitious and aiming to make a long-term impact.

Whilst important, our focus is not keeping good things going, we want to support work that is driving change for the future.

Behind the scenes



EOIs reviewed

Submitted EOIs reviewed by the Team against criteria & impact goals



Portfolio Review Meetings

Held every 2 weeks to review applications that progress past the initial phone call & agree whether to invite a full proposal



Due Diligence

After proposal submitted and a follow-up conversation, Funding Manager prepares proposal for committee discussion and decision



Decision

Decisions are made depending on the size of the request:

- *Grants up to £60k* - Executive Team
- *Grants up to £200k & social investment up to £400k* - Executive/Trustee committee, which meets every 6 weeks
- *Grants over £200k and Social Investment over £400k* - Trustee Board, which meets 5 times a year

What we consider when making decisions

- **Track record:** successes as well as the learning when things don't go to plan
- **Links to work we already support:** what's the collective value?
- **Broader context:** who are the allies, collaborators? What influence or leverage will the work have?

Will the work add value, and help us to collectively achieve our impact goals?

Grants

£40m

Yearly budget

We do not anticipate this changing, but it is regularly reviewed by our Trustees Board.

200

Organisations awarded with a grant a year

We will be making longer-term grants so this number will reduce over time.

65%

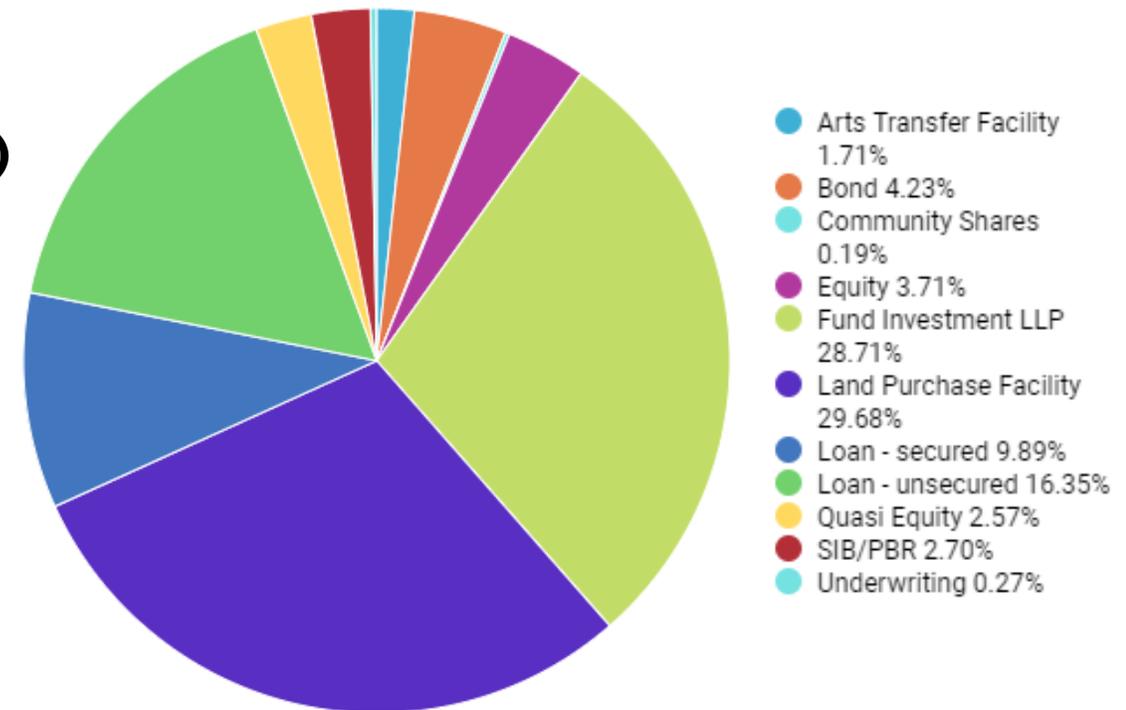
Core or Unrestricted

We will work to increase this, but funding type will be based on an assessment of what will deliver the most impact.

Social investment

- **£45m**
- **168; £62.9m to date (+£3.2m grants (49))**
- **88 exited; 65% recycled**
- **£100,000 - £2,000,000**
- **£431,000; 14 average**
- **Impact-first approach**
 - **Impact-first direct investments**
 - **Influencing the social investment market**
 - **Learning and sharing**

Portfolio by investment type (all time)



Workshops: | 1.50am to 12.30pm



1. Our Natural World

- Liam McAleese, Director – Our Natural World
- Jenny Dadd, Funding Manager and Our Natural World Lead
- Simon Wightman, Funding Manager
- Matt Cox, Investment Director

Joining link: bit.ly/esmeeworkshop1



2. A Fairer Future

- Hannah Lim, Funding Manager and Social Change Lead
- Laura Lines, Funding Manager
- Sharon Shea, Director of Portfolio
- Gina Crane, Director of Communications and Learning

Joining link: bit.ly/esmeeworkshop2



2. Creative, Confident Communities

- John Mulligan, Director – A Fairer Future and Creative, Confident Communities
- Alison Holdom, Funding Manager and Arts & Heritage Lead
- Caroline Mason, Chief Executive

Joining link: bit.ly/esmeeworkshop3