

# Better Funding Case Study



## Roger Raymond Charitable Trust: A human-centred approach to grant-making

### CONTEXT

The Roger Raymond Charitable Trust was established in 1971 by Roger Raymond, a successful businessman in the housing development sector who wished to “give back.”

A substantial proportion of the proceeds from the sale of his business was settled into the Trust, including a number of properties that he had built himself. Like many property assets, these have increased significantly in value over time.

The Trust is led by a small team of five, comprising a full-time Grants Manager, Trustees and close advisors. It is currently in the process of spending down its endowment and assets, with plans to distribute all remaining funds within the next ten years.

#### **The Trust’s focus areas are:**

- Empowerment – through education and opportunity
- Health
- Environment
- Social Care

The Trust currently maintains around 40 major partnerships and has supported approximately 100 organisations over the past four years.



# | A human-centred approach to grant-making



The Roger Raymond Charitable Trust adopts a strongly human-centred approach to grant-making. It deliberately strips away over-complicated and time-consuming processes, instead prioritising relationship-building with its grantee partners.

Potential partners are identified through desk-based research, including searching the UK Charity Commission's register for organisations aligned with the Trust's focus areas, as well as through recommendations from existing partners and their networks, and the media. While the Trust supports organisations of varying sizes, it recognises the potentially transformational impact that larger grants can have on smaller organisations.

The Trust carries out initial background research, such as reviewing annual reports, impact reports, websites and accounts. The team participate in as many webinars and partner presentations as possible, which provides different perspectives, and where opinions of other funders often become apparent.

Following this background research, the Trust then arranges a face-to-face meeting with the organisation. These in-person conversations are central to the Trust's approach. Sitting around a table together allows both parties to get to know one another and provides deeper insight into an organisation's work, values, and motivation. The Trust places particular emphasis on identifying people who are genuinely passionate and driven to address the issues they work on.

Typically, an initial meeting involves a short conversation followed by an informal lunch or drink. This relaxed setting is designed to put potential partners at ease and to foster openness and trust from the outset. The Trust finds that this approach reveals far more about an organisation than a written application form ever could. Their style is informal but very thorough.

Once a partnership is agreed, the Trust asks organisations to identify their priority funding needs. A key question is: "What is your most difficult project to fund?". This reflects the Trust's understanding that not all funders are able to accept the same level of risk, and that some vital work can therefore struggle to attract support. The Trust also recognises that circumstances change, and values open, two-way communication and flexibility, including the ability to repurpose funding as needs evolve over time.



## | A proportionate approach to reporting

The Trust applies the same human-centred principles to grant reporting. As the team explains, they would never want an organisation “to have to employ someone just to report to us.” Instead, they rely on organisations’ existing annual reports, accounts, and regular face-to-face catch-up meetings.

Where possible, the Trust prefers to receive updates and reports that organisations are already producing for other funders or stakeholders, enabling partners to focus their time and energy on delivering their core work. Short, concise updates or photographs and video reports are also welcomed as an efficient and effective way of sharing progress and these help to foster a sense of partnership.

### **Better Funding’s lens on this approach:**

A more flexible approach to reporting not only saves organizations time and allows them to focus more fully on their mission, it also encourages them to collect and reflect on the information that is most useful to their own learning and decision-making.

Rather than being constrained by rigid donor requirements, organizations are empowered to track data that aligns with their internal goals, context, and strategies. In this way, reporting shifts from being a burdensome accountability exercise to a meaningful and supportive tool, one that fosters reflection, strengthens programs, and informs future action.

# | Key aspects of the trust's grant-making practice



Many elements of the Roger Raymond Charitable Trust's approach could be readily adopted by other funders, including:

- Undertaking background research on potential partners rather than relying on lengthy application forms.
- Creating informal, in-person meeting opportunities that put organisations at ease.
- Ability to look beyond the financials and reports to really understand the goals and objectives of the organisation.
- Willingness to accept risk and understand that things do not always go to plan: “progress is made by moving forward, not by marching on the same spot.”
- Supporting organisations' greatest funding needs and remaining flexible as those needs change. Willingness to look at small capital projects, which can sometimes be difficult for charities to fund.
- Recognising that partners' time is best spent delivering on their mission rather than producing bespoke reports, and accepting reporting already prepared for other purposes.
- Believing that ‘partnership’ is the real key and valuing the drive, enthusiasm and passion of the staff.
- Building relationships grounded in trust and respect, with open, honest, two-way communication.
- Taking genuine pleasure in the Trust's work and enjoying the journey! Whilst the work they support is very serious, they create an environment for success by enjoying all aspects of what they do.