

Better Funding Case Study

# The Shears Foundation:

How *thoughtful grant-making* supports both *funders and partners*





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# Introductory Note

This case study was developed in close collaboration with The Shears Foundation to share reflections on their approach to grant-making, relationship-building and organisational practice as a small foundation. The insights were gathered through a Q&A format, allowing the perspectives, experiences and language of the foundation's team to be shared directly.

We are sharing this case study because it offers a practical example of how thoughtful grant-making approaches can support both funded partners and funders themselves. Through transparent systems, proportionate processes, long-term relationships and a strong emphasis on trust and mutual respect, The Shears Foundation demonstrates how values can be embedded into the everyday practice of grant-making in ways that are both relational and operationally sustainable.

This case study may be particularly useful for funders, practitioners and philanthropic organisations interested in reducing unnecessary burdens on applicants, designing clearer and more accessible funding processes, strengthening long-term partnerships, and creating grant-making practices that better reflect the realities and capacities of both movements and funding teams.



# Background to The Shears Foundation

The Shears Foundation is 32 years old this year (2026). It was established by Trevor and Lyn Shears as a way of giving something back to the people of the northeast of England. Trevor believed that those communities played a major part in his success and wealth through his role as a Finance Director in the transport industry. When Trevor's bus company floated on the stock exchange in 1994, Trevor and Lyn quickly committed half of their newfound wealth to establishing a charitable foundation.

Since 1994, The Shears Foundation has distributed around £17 million through more than 1,500 separate grants and currently gives away around £1 million each year.

The foundation works with 20 charities on a long-term basis, with its longest partnership spanning 25 years. Around half of its annual budget is dedicated to these long-term partnerships. The remaining half supports an open small grants programme, allowing the foundation to connect with new partners and potentially build longer-term relationships with them. Around 60 of these small grants are awarded each year.

The Shears Foundation is a generalist funder with a wide range of priorities, including:

- ✓ The development of culture and the arts.
- ✓ The development and provision of educational opportunities for adults and/or children.
- ✓ Protection, preservation or enhancement of the natural environment.
- ✓ Creating stronger, better and more sustainable communities. Promoting health and medicine, with an emphasis on research or education.



## As a small team, how have you *designed your grant application process* to ensure it works for both your foundation and the applicants?

We're truly a small team. There's two of us - adding up to one full time equivalent. That can certainly be a challenge when we're trying to develop meaningful, relational connections with the partners we fund. We have to be efficient and effective with both our systems and our interactions.

I fell into grant-making 12 years ago, more by luck than judgement, when Trevor passed away. I've pretty much had to make things up as I went along (haven't we all!). However, my background was commercial and in a caring sector (Early Years child-care) where customer service, empathy, listening and treating people with respect are paramount. It was this background, our limited resources and the [IVAR commitments](#) that have led us to develop the approach and systems that we have:

- ✔ Total transparency of information on our website – right down to publishing our scoring system, grants policy and success ratios. We now even publish our monitoring and learning form so that people know what to expect, down the line, if they are successful.
- ✔ A short eligibility quiz on our website – people know within minutes if they might be eligible for a grant.
- ✔ Short, 15-minute pre-application calls or Zoom calls with potential applicants to chat through their ideas, provide guidance and filter applications that are unlikely to be successful.
- ✔ Clear and published timescales for processing applications.

This is all underpinned by a bespoke CRM system at the back end of the website which really does help streamline our processes and save valuable staff time for real life interactions.



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## Why have you decided to *build long-term relationships* with your core grantee partners?

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For us, longer term investment in charities by providing long term grants is obvious. We can play a part in helping them to grow, become more resilient, take calculated risks and invest sustainably in what they do. We have no time limit for funding our long-term partners and funding is offered on an unrestricted basis. Trevor and Lyn pioneered this right from their early grant making and it's still hardwired into the way we work now.

## Could you share some of the *practical ways you build trusting relationships* with your grantee partners?

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We think that relationship building has to start at the very beginning. Even having really clear and honest information on our website gets things off on the right foot. We also consider our pre-application phone calls a great way to start to develop that. By actually talking to someone for real, so much early mutual learning goes on. We build from there with ongoing communication and a very informal 6-month check in where we simply ask, “How are things going?”.



We've also developed a bit of a model for how our relationships develop:

## Minimum – getting to know each other

### The Grantee

- Pre-application phone call / ZOOM.
- Encouraged to be open and honest from the start.
- Ad-hoc communication.
- Sharing successes and achievements.
- Sharing impact reports / newsletters.
- End of grant monitoring and Learning.
- Encouraged to give feedback on our processes.
- Invites to events and projects.

### The Shears Foundation

- Transparency and openness about funding priorities and decision making – Open and Honest processes.
- Transparency and openness about our expectations of the grantee.
- Offers **Project focussed** funding and some core cost funding.
- Highest level of due diligence. Which allows us to place trust in the grantee from the start of our relationship.
- Reads and feeds back on communications.
- Has an honest 6-month check in with the grantee.
- Some trustee attendance at celebration events.
- Manager / Trustee meet ups with Fundraisers.



## Strong – building on the foundations

### The Grantee

- Feels increasingly able to share when things might not be going so well.
- Feels able to apply for funding to continue a previously funded aspect of their work – no need to reinvent the wheel for each application.
- Extends a range of invitations that allow trustees to develop a deeper understanding. Opportunities to discuss future applications.

### The Shears Foundation

- Offers largely **core cost** funding.
- Still a high level of due diligence.
- Trustee attendance at ‘real world events’ seeing the work of the charity first hand.
- Open to ongoing conversations and supporting the grantee in overcoming challenges.
- Increased flexibility.
- Willingness to allow funding to be re-purposed.
- Introduces the grantee to other potential grant funders.



## Strongest – mutual understanding and respect

### The Grantee

- Able to be extremely honest about needs and challenges, even failures, of the organisation without feeling the relationship will be compromised or grants withdrawn.
- Able to direct our funding to where it will have the most impact.
- Able to ask for variations in timescale or purpose – even early release of pledged grants (dependent on our cashflow)
- Able to seek our advice and support with matters that are not necessarily grant related – such as strategy.
- Invitations for connections develop into a wider range of trustee opportunities, Social, experiential, grant focussed and broader organisational context.

### The Shears Foundation

- Offers largely unrestricted funding.
- Less rigorous due diligence.
- Trustees feel better connected as true stakeholders.
- Trustees are part of the charity's own growth journey.
- Greater impact satisfaction for trustees.
- Willingness to 'move the goal posts.' To help meet grantees' needs and priorities.
- Able to have difficult conversations with the grantee about our own challenges and priorities and implications for grant making.
- Lighter touch reporting.
- Actively promotes the grantee to other funding organisations.



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## *What motivated you to sign up to IVAR's Open and Trusting Grant making pledge?*

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We'd like to think that our practice was very much aligned with IVAR's commitments before we signed up. We were so lucky to have a founder whose ethos was, from the start, about being fair, equitable and respectful – values that we've carried forward throughout our grant making. We signed up to the IVAR pledge because it's one thing to think and say you're doing things right and another thing entirely to put your practice into a framework, to be challenged on it, to be held accountable and to continually improve.

We keep ourselves honest by using the eight IVAR commitments as the basis for our post-applications questionnaire that both our successful and unsuccessful applicants are invited to complete. We essentially ask them to judge us on how well we are performing against these commitments.

## *How do you approach reporting?*

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Our approach to reporting tries to be proportionate, meaningful and as light touch as possible. With our multi-year grants we don't ask for much reporting until the end of the grant period (usually three years) – maybe recycled reports to other funders or publications that already exist.

Our final Monitoring and Learning is a simple one-page form. When people apply, we ask them to tell us just one thing they want to achieve with the grant. As well as a simple summary of how the grant was spent, we ask them in just four questions how they've got on against this and what they have learnt. We try to get those we've supported to be as honest as possible about what didn't go so well or what they would change – but we know this isn't always easy for charities because of the power dynamic.



## **BETTER FUNDING LENS ON THIS APPROACH:**

The experience of The Shears Foundation offers a clear and practical example of what it means to embed open and trusting grant-making in day-to-day practice, particularly within the context of a small funder. The foundation has recognised that simplifying systems and processes works for both funders and funded partners. Streamlining their application and reporting processes ensures that they use their limited staff time efficiently and effectively, as well as benefitting busy non-profit partners.

We love how they have grounded their approaches in their values, establishing relationships based on openness, respect and mutual learning and recognising the inherent power balance that exists in funder and partner relationships. The Shears Foundation demonstrates that transparency, equity and respect can be operationalised through simple, thoughtful design choices—such as publishing success rates, offering pre-application conversations, and clearly setting expectations from the outset. These approaches not only improve efficiency for a small team but significantly reduce wasted time and effort for applicants.

We found their staged approach to relationship-building outlined in the case study particularly helpful. It highlights how trust is built gradually through consistency, openness and mutual learning, and how this trust, in turn, allows for greater flexibility, honesty and impact over time.

This case study reinforces that being a ‘better funder’ is not about scale or complexity, but about mindset. Even with limited capacity, funders can make meaningful changes that prioritise relationships, reduce burden and centre the needs and expertise of the organisations they support.

Overall, The Shears Foundation provides a compelling example of how small foundations can lead the way in adopting more open, trusting and effective grant-making practices.



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## Do you have any *recommendations for other funders?*

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I'd recommend to other small family foundations that the most important thing is to establish an ethos based on the values of openness, equity, mutuality and respect and embody that in all that you do. Try to recognise and mitigate the power imbalance that will always exist between the funder and the grant recipient. Above all, enjoy your grant making and make it as enjoyable as you can for your partners.



With thanks to ***Bruce Warnes,***  
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You can learn more about  
***The Shears Foundation's*** inspiring  
work here:

<https://shearsfoundation.org>



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