



Grant funding at its best

Access Social Care and Oak Foundation

Access Social Care is a new charity set up in 2019 to provide free legal advice and information for people with social care needs, helping to achieve a better quality of life. We work with communities to increase knowledge of the law and our rights. We highlight the gap left by cuts to Legal Aid to provide advice for those who can't afford it. With a 98% success rate, our network of lawyers and barristers ensure fair access to justice when things go wrong. We collaborate with social services whilst holding them to account. We are working towards a future where social care is adequately funded, and we all get the support we need. As a team we have worked together for over ten years, previously incubated at national disability charities; Sense and Mencap.

Oak Foundation commits its resources to address issues of global, social, and environmental concern, particularly those that have a major impact on the lives of the disadvantaged. Oak has its main administrative office in Geneva, Switzerland, and a presence in five other countries: Denmark, India, the United Kingdom, the United States, and Zimbabwe. Oak Foundation makes grants to organisations in approximately 40 countries worldwide. Since it was established in 1983, Oak's grant-making budget has grown to over USD 290 million a year. Oak Foundation has six main programmes: environment, housing and homelessness, international human rights, issues affecting women, learning differences, and prevent child sexual abuse. It also has a special interest programme, through which its Trustees support causes that fall outside of the remits of the main programmes. There are also four national programmes in Brazil, Denmark, India, and Zimbabwe.

Our Story

Back in 2017, Access Social Care's CEO, Kari Gerstheimer was Director of Information and Advice at Mencap. Having seen years of cuts to charity advice services and legal aid for community care cases, Kari had seen a gap in the provision of access to justice for people who were not having their social care needs met. Most people cannot afford lawyers, but more importantly do not even know what their rights are! Kari's vision was to create a membership service to link the legal expertise to other organisations working directly with older and disabled people with social care needs, thereby creating a sustainable model to provide expert legal advice. Not only that, Kari saw the power in working at scale with provider organisations – and that if we worked together, the collective data would both join up the dots and paint a picture. This picture could then be used to change the face of social care for good! Kari pitched the services of her whole team to the community care sector, with the idea of creating a Legal Network, and providing the third-tier advice to expensive and under resourced helplines. Former CEO of Mencap and now Chair of Access Social Care, Jan Tregelles, had seen too many families at breaking point at Mencap and brought Kari and her team on board.

The Legal Network was a huge success. The service grew, we took on 7 members, and our prize-winning pro-bono services were recognised for their excellence by the Advocate and LawWorks awards. We had ambitious plans.

In 2018 we were introduced to **Oak Foundation** by Mencap's Fundraising Team. Oak Foundation saw an opportunity for an ambitious team of successful people to create a movement, and to shake up the system in social care. At the same time providing a much-needed support and lifeline to people who are at an extreme disadvantage. The Legal Network was awarded a grant of £2m over four years to expand its service. With members lining up to join, the service became too big to continue its incubation at Mencap. In late 2019 it was registered as an independent charity and in early 2020 Access Social Care was born.

We would not be here without Oak Foundation and are forever grateful for the opportunity to work with the team. The grant itself is so much more than just the funding – it comes with a wealth of knowledge, mentoring and guidance.

Any fundraiser or charity will know that grant fundraising can sometimes be onerous... long-winded applications, multi stages, no opportunity to communicate with the Trust and if you are lucky enough to be successful, requests for detailed and long reports for what is often quite small and restricted grant funds. This is the opposite of the experience of working with the team at Oak.

Here we meet with Rachel Quick, Director of Special Interests grants at Oak foundation. The programme has an average grant-making budget of over USD 50 million and has six staff. Special Interests grants cover a wide range of fields, including health, humanitarian relief, education, and the arts.

When did you first hear about the legal network as it was known then?

I first met Kari in 2018 when the Legal Network was a pilot project housed by Mencap. We had a meeting with one of our Trustees in London and Kari and her colleagues from Mencap set out why this service was so desperately needed.

What were your initial thoughts?

I was blown away. It was one of those special moments when I knew I was in the room with a truly gifted leader – Kari – and a brilliant idea which could be transformational for the social care sector. As a grant-maker, this is the dream! Hearing from experts in a field about where the gap is and how some seed funding could take a project to scale and have major impact. As a former lawyer myself, I knew enough about the legal system in the UK to recognise Kari as an expert in both social care and the law, and it was clear that she knew how to make those two complex systems easier to navigate for people in vulnerable situations. More importantly, our Trustee was blown away too and asked Kari to send her a few different funding models to consider, and that led to a major grant award.

How do you ensure that the objectives and goals of both grant maker and grantee are aligned?

It's an on-going conversation but at Oak we are lucky that our Trustees enter these relationships with a lot of trust. If they are inviting an application from an organisation, it is because they see the potential in the mission or project being proposed and they believe in the individuals taking it forward. So the question is rather, how can Oak best support this work, setting it up for success and sustainability.

Talk us through your role in Oak Foundation's grant making process?

In the Special Interest Programme, we get to work with all seven Trustees. They each have an annual Special Interest budget and they identify projects they want to support, and we (my team and I) divide these between us and work with the partners to make grant recommendations. This involves working with applicants on their proposals, carrying out financial and other due diligence on the organisation and working together to make the grant recommendation as strong as possible (which may involve capacity building and other support). The grants then go to our President and the Trustees for their consideration and hopefully, approval. Then we monitor progress on open grants and work with our partners to assess impact when the grant period ends.

Do you see the relationships with your grantees as Partnerships?

Absolutely! This depends on building a good rapport and again, on trust. I think I speak for every staff member of Oak when I say we view it as an absolute privilege to work with people who are the top of their game in their respective fields and in my programme, we cover so many different fields that we are always learning new things. We try to encourage an honest dialogue from the beginning so that as challenges come up, we can look at them together, find solutions and make course adjustments as needed. Due to the high volume of special interest grants, we are not always as responsive as we would like but we are working on trying to make our internal processes simpler so that we can be more outward-facing.

The habit in the UK has traditionally been for grants of 1-3 years, however the trend is now moving towards larger grants over longer periods, what are your thoughts here?

Personally I do not like one year grants so much, unless they are in support of a time-limited project (like a campaign) or a pilot, or perhaps a capacity building/planning grant to help an organisation get to the point where it can apply for a larger grant. Longer grant periods provide greater stability to the organisation, a better opportunity to see the impact of the funding and a chance to build the relationship and learn from each other. But the right length depends on so many factors. Our Trustees often offer organisations a front-loaded grant to enable them to get started and to attract other funders as they demonstrate their impact.

Outside of the annual reporting process – how do you like to communicate and keep in touch with your grantees?

Before the pandemic, site visits were a great way to keep in touch and to see the work on the ground, but now we have 6-monthly catch-up calls. In the meantime, events and opportunities for learning come up and partners contact us whenever they feel like it, to keep us informed of progress or ask questions, and vice versa.

Any final thoughts?

Access Social Care has already surpassed my high expectations and I feel lucky to have been a small part of their development these past few years. Kari and her team are so hard-working and committed, it is really a privilege to work with them.

We love working with **Oak Foundation** and feel truly supported by them, they are always at the end of the line and ready to provide support and guidance when we need it.

This Q&A is the first in what we hope will be a series of Grant Making at its best. We have had some brilliant successes in our inaugural year of grant fundraising at Access Social Care and would like to shout out about some other great funders.

Thank you! Together we make a world of difference.