

Fair economy. Better world.



Programme Advisory Group Shifting Cultural Perceptions of the Economy 2024-2027



Deadline for applications: 27 August 2024



Programme Advisory Group

Shifting Cultural Perceptions of the Economy

2024-2027

Friends Provident Foundation is seeking advisory group members to work with us on an exciting new area of grant funding over the next 3 years. We will be exploring perceptions and mindsets that dominate how we think about the economy, and how we feel about the potential to change it. We are looking for individuals with an interest and related expertise to help us guide this work and learn together alongside the organisations we fund.

Role description

Purpose

The purpose of the Advisory Group is to support a strand of Friends Provident Foundation grant funding which explores how we can begin to shift perceptions and beliefs about the economy. It will focus on how we can promote the idea that change to a fairer and more sustainable system is possible. Recognising the enormity of this challenge it will take the approach of an **action research set**, seeking to generate shared learning that will push thinking further. The advisory group will help Foundation staff to support this learning group and will be available to grantholders for advice.

The role and responsibilities

- Assessment: Supporting the recruitment of a coherent group of applicants to create a well-balanced action research group that will work together on the programme over 3 years. This involves reviewing applications at the outset of the 3-year period, analysing and assessing

the applications and providing relevant advice or information on areas of policy and practice within their expertise. It will then involve reaching a consensus, in consultation with other group members and Friends Provident Foundation staff, to recommend a balanced group of 5-6 grants to take forward to Friends Provident Foundation trustees (for final approval).

- Programme days: Actively participating in 9 programme days spread across the 3 years, reviewing content, providing advice and thinking through the direction of the work as a whole. Lead sessions, ask questions, lead on explorations of themes, helping to bring it back to the central questions for exploration.
- Learning: Programme learning will be led by a learning partner but advisory group members will be expected to contribute to conversations about how we measure success and look at progress collectively. They will also help reflect on key themes, questions, and learning points that are emerging from the work.
- Ongoing support: Being available as a source of knowledge to offer ad hoc advice to grantholders, utilising networks to recommend speakers or connections for the network.

The Advisory Group does not:

- Make the final decisions on grants
- Expect Trustees to always accept a particular recommendation

Membership

We anticipate that the group will be made up of 5-6 experts with a spread of knowledge and expertise relevant to the focus of the programme. They will be supported by programme staff and an external facilitator working on the Shifting Cultural Perceptions funding strand.

Time and anticipated dates

- Attendance at an online introductory session (up to 2 hours), late September or early October 2024
- An estimated one day reviewing applications in Year 1 (October/November 2024)
- Attendance at a one-day assessment meeting, preferably in person (scheduled for late November 2024)
- Attendance at three programme days per year (dates to be confirmed but the first is expected to be Feb/March 2025)
- Occasional additional support over the year for areas outlined above.

What we are looking for

We are seeking people with a genuine interest in, and enthusiasm for this topic, but who will come to the group with an inquisitive and learning mindset. It is an exploration of a variety of methods coming together and is not expected to produce one right answer. In particular we would welcome:

- Expertise on behaviour change, particularly public and social behaviours.
- Experience of shifting mindsets on big issues from related fields such as politics, public health or climate.
- Expertise in framing, narrative or use of language.
- An interest in engaging with communication outputs.
- Experience in analysing thoughts, connections and mindsets in relation to the economy itself

Confidentiality and conflicts of interest

As we want to create a learning environment where successes and failures can be openly explored, we will apply Chatham House rules to the meetings and content shared where it relates to individual projects/organisations involved in the group. We encourage building connections and having wider

conversations about the work but would expect Programme Advisory Group members to seek permission from individual participants before sharing any information about their work that isn't publicly available.

The content and scope of all proposals considered are to be treated confidentially and should not be distributed or copied beyond the group in any way that means proposers or institutions are identifiable.

Advice from the group will be passed to Trustees in an unattributed way, unless specifically agreed.

Relevant programme advisory group members may well have connections and prior knowledge of applicants. Members will declare any conflict of interest regarding the applications they are reviewing at the start of the review process and Friends Provident Foundation staff will consider the most appropriate way to handle their input to that part of the meeting.

Fees and Expenses

- We can offer an honorarium of up to £2,000 per annum to enable participation. The Foundation is not able to meet the cost of loss of earnings for members working in a freelance or self-employed capacity.
 - Where a fee is agreed by the Foundation, individuals will be responsible for ensuring that the appropriate taxation and benefit regulations are met.
 - Travel and expenses for meeting attendance can be claimed in addition to the participation fee. Public transport should be used wherever possible. Please note that only standard class rail travel can be claimed. Bus or tube fares are paid for London meetings, not taxis unless in exceptional circumstances. However, if attending a meeting in York a taxi may be claimed from and to the station.
 - Hotel accommodation will be paid for where necessary. Approval should be sought from Foundation staff in advance.
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Shifting Cultural Perceptions of the Economy

About Friends Provident Foundation

Friends Provident Foundation is a capitalised charity. We use our grantmaking and investment activities in pursuit of our mission for a fair and sustainable economic system.

We believe that our economy contributes to many of the problems that we face but we also believe that it does not have to be this way. We have a vision for a better economy.

Since we were established in 2004, our programme has evolved from promoting financial inclusion, to supporting financial resilience and then more recently a focus on systemic economic change. We have supported many projects and organisations working on economic change. Post-2008 we have funded the development of many ideas and practical initiatives that have made some progress in trying to find new ways to shape our economy.

Today, however, the financial system has firmly re-asserted itself, and climate breakdown and inequality have worsened. The UK is not short of ideas on how to change this: we have an active, creative movement of new economy organisations generating a wealth of intelligence, evidence and innovations for shifting the economy.

But we need to turn our attention to what is stopping these ideas becoming a reality. At Friends Provident Foundation we believe that the UK's collective cultural perceptions of the economy are one key block to change.

The problem

How we think about the economy, our perceptions, stories and understanding of what it is and what it does, often do not allow us to think about how we could change it. It can feel as though it is immovable and inevitable and the idea of shifting it then feels too big to tackle.

We often talk as if the economy is an external structure. It isn't. It is about every single person and decisions they make every day, it is about how we live and interact. If we want to create a better economy for tomorrow we need to start talking and thinking about it differently, the more we do that, the more we can imagine what a better economy looks like.

The questions we want to ask:

This strand of funding will explore how we can begin to shift perceptions, cultural assumptions and beliefs about the economy – what it is and what it could be. This is not about what the future economy looks like, it's about creating a mindset that enables change within the economic system – exploring how we can create the conditions for change. The programme will focus on how we can promote the idea that change is possible. Recognising the enormity of this challenge, it will take the approach of a three-year action research set, seeking to generate shared learning that will push our thinking further after the funding period.

Delivery Approach

This programme will be a one-off open call for up to six organisations who want to work with us over three years to explore this theme. The strand will involve:

- A closed action research group.
- For each organisation recruited, funding of £50,000 per year for three years (£150,000 in total).
- Participants can either come to us with existing work they do that is relevant to our analysis, or propose new activities that would help us dig deeper into it.
- In addition to delivering individual projects/activities, organisations will be paid to participate in a series of facilitated programme learning days where they will share learning and hear from external experts and the Programme Advisory Group.
- At the end of the three years we hope to have generated shared learning and experiences that can further push our thinking on how to set the scene for meaningful economic systems change.

What we are looking for:

- Understanding of mental modes, attitudes, behaviours, mindsets and assumptions related to the economy – what shapes them, drives them, and influences them.
 - Ideas on how change (in regard to the above) happens and how it can be influenced.
 - An exploration of how we can create the conditions for change.
 - To solve this we need to engage with a range of political perspectives, ways of thinking and understandings – and so we would want to recruit a group that reflects or understands this.
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- A range of disciplinary background and areas of knowledge/expertise – e.g. polling experts, NGOs, academics, media, framing, deliberative processes, behaviour change, and more.

Activities funded could include:

- Research
- Practical programmes and activities focused on changing economic perceptions
- Experimental approaches

Planned timelines

- Programme Advisory Group recruitment – July/August 2024
 - Programme opens for applications - September 2024
 - Application deadline – November 2024
 - 1st Programme Advisory Group meeting – November 2024
 - Grants awarded – December 2024
 - Programme activities start – January 2025
 - First programme day – February 2025
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How to apply

To apply please send an email attaching your CV and a short note explaining why you would like to be involved by 10am on Tuesday 27 August to Jo Wilce, Grants and Learning Manager at enquiries@friendsprovidentfoundation.org.uk. We will acknowledge receipt of your application.

If you would like an informal discussion about the role ahead of this date, please contact Jo on joanne.wilce@friendsprovidentfoundation.org.uk.

Privacy Notice

What we collect and why

When you apply to us for a role you will be providing personal data about yourself, through which you can be identified. We have written this notice to let you know how we will handle and protect your information.

Information which may be collected during a recruitment process, may include:

- Name
- Your work, education and training history
- Contact information including email address, postal address and phone number
- Contact information for your referees
- Any other personal information which you choose to give us relating to your application
- Notes made by the selection panel during shortlisting and the interview process

We require this information in order to review your application, undertake and support the recruitment process, and communicate to you the decisions and outcomes of that process.

The Data Protection Act (2018) sets out that we are required to have a lawful basis for processing your data. In this instance we are processing your data under 'legitimate interests' specifically to support our recruitment process and applicants, as outlined above.

We store this information on our office IT systems, including cloud-based directories and email system, and in paper-based files. We retain information for unsuccessful applicants for a period of 6 months following the completion of the recruitment process, to enable us to provide feedback, address any other queries, or disputes. After a period of 6 months we will delete your data.

In addition you may also provide information in response to our Equality, Diversity and Inclusion monitoring form, including your age, gender, ethnicity, disability, sexual orientation, class background. This information is stored separately from your name and application details on Survey Monkey. We may bring this information into our office computer systems to analyse in aggregate with other applications, but the information will remain anonymous. The survey results on Survey Monkey will be retained, to enable us to monitor effectiveness of our recruitment strategies and reach over time.

For any concerns you have about our use of data, please contact us on enquiries@friendsprovidentfoundation.org.uk.

You can also contact the Data Protection Regulator, the Information Commissioner's Office (ICO): <https://ico.org.uk/global/contact-us/>