

# Bevan FOUNDATION

# Changing Wales



## Who we are

### The Bevan FOUNDATION

develops solutions to social and economic problems in Wales through research, publications and events.

It is a registered charity (no. 1104191) and company limited by guarantee (4175018).

## The need for action

The longest and deepest recession since the 1930s has continued to have a severe impact on people in Wales, with high levels of low income, ill health, low educational attainment and poor housing. The scope of the public and third sectors to address these problems has been curtailed by constraints on spending. Now more than ever we need new ideas about widening economic opportunity, tackling poverty and reducing inequality. The Bevan Foundation develops new ideas through:

- research and inquiry into the underlying causes of social inequality and injustice,
- the development of proposals for effective policy and practice,
- persuading policy makers, practitioners and the public to change.

## What we did

In the past year we focused our activities on four key themes:

### Poverty and disadvantage

We continued our innovative programme of awareness-raising and research to find solutions to poverty and disadvantage. We worked with the Joseph Rowntree Foundation to disseminate the findings of its *Monitoring Poverty and Social Exclusion in Wales 2013* report and published some case studies of good practice, helped to disseminate JRF's *Poverty and Ethnicity in Wales* report and delivered a programme of seminars on *Poverty and Education in Wales*. In addition, our Director was a member of the Joseph Rowntree Foundation's task group to develop a UK anti-poverty strategy.

We were pleased to provide expertise to the Welsh Government and National Assembly for Wales including:

- preparing a report on indebtedness and poverty, commissioned by the Public Policy Institute Wales;
- advising the Welsh Government's Advisory Group on Tax;
- giving expert evidence to the National Assembly for Wales's inquiries into education and poverty and on its forthcoming inquiry into poverty.

We also advised Big Lottery Wales on criteria that could be used in place-based funding, and researched the impact of austerity measures on older people for the Older People's Commission.

We continued high quality local studies of deprivation, undertaking a review of the impact of the recession and welfare reform on women in Ystradgynlais for Joyce Watson AM, and a study of unemployment in Brynmawr for the Blaenau Gwent Communities First North Cluster (due for publication later in 2014).

### Economy and Employment

The Bevan Foundation's experience of work on how co-operative businesses can provide greater social and economic benefits than conventional business structures contributed to three separate projects. We:

- drafted the final report for the Welsh Government's Commission on Co-operatives and Mutuals,
- organised the 2013 Robert Owen Awards for Co-operative Membership Cymru, and
- 'mapped' Welsh co-operatives and social enterprises for the Wales Co-operative Centre.

We worked with Cardiff University to disseminate the findings of two major research programmes on employment, skills and the labour market, bringing together policy makers in the public, private and voluntary sectors with leading UK academics, to inform policy and decision making.

Our Director was a member of the UK Living Wage Commission, chaired by the Archbishop of York, which looked at how the earnings of the lowest paid in Wales and the rest of the UK could be increased to provide an acceptable standard of living.

### Public Transport

The Bevan Foundation has a long-standing interest in public transport because of its importance to people on low incomes and people with protected characteristics. In summer 2013, we undertook a review of long-distance bus services in Wales for the Welsh Government, and also undertook an equality impact assessment of proposals to cut bus services for Powys County Council. Later in the year, we completed a report on the importance of public transport for older people in Wales for Age Cymru.

### Health and Social Care

We were delighted to launch the inaugural Bevan Prize for Health and Well-being, which recognised outstanding projects which uphold the values of a National Health Service, available to all and free at the point of use. The distinguished judges, Prof Mansel Aylward, the sadly now late Geoffrey Goodman, and Jaselle Williams announced the winners at the Atlee Suite, Portcullis House, London.

Constraints on our funding meant that other work on health and social care was relatively modest. We organised a debate on 'the right to be treated' with the Institute of Welsh Affairs and began a research project (for completion in 2014/15) with Marie Curie Cancer Care on end-of-life care.





# What we changed

The Bevan Foundation's overall charitable purpose

is 'the education of the public', with a particular focus on public policy. We have achieved our purpose through an extensive programme of publications, media coverage and events:

## Publications

- Publishing seven different reports or pamphlets, some by our own staff and others by distinguished guest authors including Assembly Members and the heads of well-known charities;
- publishing seventy nine different articles on our website, typically attracting more than 500 readers a week, with a wide range of guest authors from Assembly Members and Members of Parliament to disabled people, trades union members and charity workers;
- publishing three issues of our members' magazine, **Review**, with more than 40 thought-provoking articles from leading writers.

## Media Coverage

- Commenting in the Welsh daily press at least once a month on issues as diverse as payday loans, food banks, fitness for work, health inequalities and educational attainment;
- appearing on Welsh peak-time radio and television on nine separate occasions, discussing the Living Wage, long-term unemployment; public transport and welfare reform.

## Events

- Attracting more than 600 delegates to a mix of seminars, conferences, round table discussions and awards ceremonies;

- speaking at events organised by others, such as the campaign against loan sharks organised by Community Housing Cymru and the AGM of Bridgend Association of Voluntary Organisations.

## Informing public policy

- Being quoted in plenary questions by Assembly Members from all parties on, for example, free school meals, the new Discretionary Assistance Fund and women's employment;
- informing the National Assembly for Wales's conclusions on the future of equality and human rights, and on poverty and education;
- persuading Powys County Council to reconsider proposed cuts to bus services.

Our activities have an impact that is often difficult to measure, as we do not necessarily know if an individual or organisation uses our findings to inform or change their own policy or practice. We are aware of our work being used by organisations ranging from Public Health Wales, Lloyds Bank Foundation, Equality and Human Rights Commission and many more as well as by school pupils studying the Welsh baccalaureate and students at Cardiff University.

Our evaluation of the poverty and education network found that half of those attending one or more seminars had made 'a lot' or 'some' changes to their organisation's policy or practice as a result of participating – a very significant achievement. A survey of our general impact in 2013/14 found that more than 90% of organisations said that we had provided useful evidence for their work and had increased their understanding. More than a quarter of individuals said that their views had changed as a result of our activities, while an impressive one in ten organisations said that they had changed their policies or practices.



## Finances

The Bevan Foundation does not have an endowment and relies on grants, donations and trading to achieve its aims. The financial climate in 2013/14 continued to be very challenging. Nevertheless the Foundation turned around its previous year's loss to generate a surplus of £29,579, through a mix of cost reduction, additional one-off donations thanks to the continued partnership with Green Man, and a very high level of contract research work.

The surplus increases reserves to six months' running costs, most of which will be used in 2014/15 to put the Foundation on a more sustainable financial footing by releasing time to submit funding applications to trusts and foundations, develop business partnerships and grow individual membership and donations.

### Income

Total income in 2013/14 was £163,662.

### Membership and donations

The Foundation received £55,526 from donations including membership subscriptions, recovering the disappointing income in the previous year. The continued partnership with Green Man festival was much appreciated, with the profile in Green Man's publicity enabling the Foundation to raise a total of £10,000. We were also pleased to host a fund-raising lunch with Keir Starmer, former Director of Public Prosecutions, as our guest speaker – we are grateful to the Potted Pig restaurant and Positif Politics for their assistance.

Our members' magazine, **Review**, continued to be very popular. We established a members' area of the website where back-copies are available along with member briefings e.g. on the Living Wage and tax reform, along with space for comment and debate.

### Grants

Income from grants in 2013/14 totalled £24,237, a relatively small proportion of total income. The Bevan Foundation gratefully acknowledges grants from the Joseph Rowntree Foundation towards core costs, from Jobs Growth Wales and Go Wales towards the costs of temporary staff, and from Merthyr Tydfil County Borough Council towards the costs of upgrading the website.

### Research and Events

The majority of the Bevan Foundation's earned income, £81,719, came from research, events and publications. All this income was generated by trading consistent with the Foundation's primary purpose.

### Expenditure

Total expenditure in the year was £119,292, an 18% reduction on the previous year. Of this just over 70% was employment costs.

## Looking ahead

We are proud of our achievements especially given our modest resources. While the need for our activities is greater than ever, the funding climate remains extremely challenging and new policy-oriented organisations have emerged. We are taking forward our process of transformation begun in 2012/13 under the leadership of interim chair Sandy Blair to:

- restructure the Board to bring the right mix of skills and experience
- appoint a permanent chair in late 2014
- undertake a strategic review of our direction
- actively seeking sustainable funding.

## Administrative details

### Trustees:

Sonia Behr  
'Sandy' R D Blair (*Chair from 7th November 2013*)  
Stephen Brooks  
Dai Davies (*Treasurer*)  
Cerys Furlong  
Jeremy Gass  
Daran Hill  
Jeremy Miles (*Secretary from 7th November 2013*)  
Timothy Palazon  
Simon Pickthall  
Vivienne Sugar (*Appointed 7 February 2014*)  
Jaselle Williams

### The following trustees resigned during the year:

Alun Burge  
Gideon Calder  
Bob Chapman (*Secretary to 7th November 2013*)  
Paul O'Shea (*Chair to 7th November 2013*)

### Staff

Victoria Winckler Director  
Anne-Marie Carpenter Office Manager  
Catherine Davies Research and Marketing Assistant (*to Oct. 2013*)  
Laura Rees Marketing Assistant (*from Feb. 2014*)