

CARNEGIE UK TRUST - HISTORY AND MISSION

The UK Trust was established in 1913, with funds to be used *“for the improvement of the well-being of the masses of the people of Great Britain and Ireland, by such means as are embraced within the meaning of the word “charitable” [...] and which the trustees may from time to time select as best fitted from age to age for securing these purposes, remembering that new needs are constantly arising as the masses advance”*.

At the time that the UK Trust was established, there were no comparable Trusts or Foundations in the UK. The only trust of a similar size was what is now the Trust for London, which was limited to working in the capital city.

There was interest of £100k to be spent every year from 1913, a very significant sum, equivalent to nearly £9.4m today. How the money was spent was viewed as a matter of national importance. Early Trustees wrestled with what was meant by “wellbeing”, who “the masses” were, what the word “improve” entailed, as well as how a Trust could operate successfully across such a large geographical area.

It’s interesting now to go and read the history¹ of Trust’s first 100 years for an insight into the broad sweep of events across that century, as the Trustees matched their priorities to the prevailing challenges of the day. Further information is available on this [timeline](#).

An early concern with physical welfare gave way increasingly to concerns about social welfare; the impact on society of two world wars and periods of profound economic depression; changing attitudes to immigration and disability; changes in the role and status of women and young people, and changes in the cultural environment. And underlying all this, enduring concerns about the needs of rural communities, the importance of education in the broadest sense, and the importance of promoting the wellbeing of individuals and communities.

The size of the endowment meant that the Trust was able to make bold and innovative investments in projects that might have been too risky for governments or for smaller trusts. From very early in the Trust’s history, it defined its remit as being “pioneering”, assuming that the idea of “improving” the wellbeing of the people implied doing something new and different.

These innovative projects have included creating the first colleges of adult education; support for the first pre-school playgroups; setting up pioneering courses in social work and librarianship; supporting the first Leonard Cheshire Home; pouring money into the creation of playing fields.

And it wasn’t all about direct funding in the early days either: the Trust commissioned groundbreaking reports on major social issues which were often ahead of their time.

Indeed, there is probably a common perception that charitable trusts are primarily in the business of giving out grants, but the CUKT has never seen its role as being just about providing reactive financial support. Throughout its history, it has commissioned reports, initiated inquiries, set up commissions and organised conferences to explore issues of interest in more detail before

¹ Copies of this book are available on request from the UK Trust at Andrew Carnegie House.

committing to investing resources. In other words, the Trust has always considered that its remit is about influencing policy as much as supporting innovative practice.

However, in 2004 the UK Trust made a major decision to become what is known as an Operating Trust, a charitable organisation that funds its operations through the income from investments, as opposed to disbursing that income through grants to other organisations. At that point it defined its role as being *“seeking to influence public debate, public policy and practice through independent commissions of inquiry, pro-active action research and strategic partnerships in the UK, Ireland and internationally”*.

This change was partly influenced by the advent of the Big Lottery (now the NLCF) which was able to provide much bigger, longer-term grants, as were various European funding programmes. Alongside that, CUKT’s grants were short term and small scale and not nearly as impactful as the national strategic initiatives which actually influenced public policy and could therefore benefit a far wider number of people.

The Trust has always worked to cycles of 5 years of activity, reviewing areas for focus and making strategic choices about where to invest effort over the coming period. Over the past decade, there has been a move away from relying on large-scale commissions of inquiry to a more flexible, responsive approach to policy analysis and advocacy.

The Trust’s “theory of change” is that you invest in testing and delivering real-life solutions, study these, draw conclusions and deploy these insights for advocacy with governments and other decision makers.

We are now in the final year of the [2016-2020 Strategic Plan](#), and over that time have focused on 4 high level “domains” of practice and policy development. These are “[Enabling Wellbeing](#)”, “[Digital Futures](#)”, “[Flourishing Towns](#)” and “[Fulfilling Work](#)”.