



## Annual Review 2019

**The Carnegie UK Trust works to improve the lives of people throughout the UK and Ireland, by changing minds through influencing policy, and by changing lives through innovative practice and partnership work.**

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# Introduction

**2019 marked the centenary of the death of Andrew Carnegie. To commemorate that event, each of the institutions that he founded was invited to write a letter to the man himself, reflecting on a centenary of effort to achieve his enduring vision.**



Sir John Elvidge



Sarah Davidson

In our own letter, written on behalf of the Carnegie UK Trust, we noted that the past century had seen significant attempts to bring about improved wellbeing and enormous progress in the prosperity of our society. Yet we can also clearly see that despite those ten decades of progress, a large number of people still do not share in the same opportunities as others. It is this mission, to promote the wellbeing of all with a particular regard for those who are least advantaged, that continued to motivate the Trust in 2019, as it motivated Andrew Carnegie a century ago.

2019 was the penultimate year of our 2016-2020 Strategic Plan. It was a year of continued political turbulence associated with the departure of the UK from the European Union, culminating in General Elections in the UK and the Republic of Ireland in December 2019 and February 2020 respectively. While this context limited the scope for some public policy advocacy, we nonetheless managed to capitalise on the momentum generated by our work in the preceding years across the four themes of Digital Futures, Enabling Wellbeing, Flourishing Towns and Fulfilling Work.

This was also a year marked by a change in the leadership of the Trust, with Sarah Davidson

joining in August as our new Chief Executive, succeeding Martyn Evans, who left the organisation in March. Trustees paid tribute to Martyn's leadership in this publication last year and they warmly welcomed Sarah's appointment in April, following a process which explicitly sought a candidate with the leadership skills to take the Trust to meet new levels of ambition under our next Strategic Plan.

Developing a more holistic approach to improving wellbeing has been an increasing preoccupation of Governments and other institutions across the UK and internationally in recent years. 2019 was a year in which we were able to build on the strong foundations of our own work in this arena to support increased advocacy for the effective implementation of wellbeing frameworks in England, Scotland, and Northern Ireland. In the last of these, we focussed our attention on supporting Community Planning Partnerships to develop in ways that support wellbeing outcomes. We were pleased to be able to maintain momentum in this work at a local level during a difficult period while the Northern Ireland Executive remained in suspension. We welcomed the re-establishment of power sharing in early 2020,

and in particular the continued commitment by the Executive parties to a Programme for Government structured around a wellbeing approach.

A core component of a wellbeing approach is the active participation of citizens in decision-making and delivery, something that we have argued for over many years. In 2019, this work manifested itself in the publication of Participating People, the final report of our multi-year work with The Wheel in Ireland which was positively received by President Higgins. We published our cross-jurisdictional review of progress towards an Enabling State in the UK, and continue to support the growing Better Way network in England which explores putting these principles into practice. Our programme on kindness has continued to find broad support, with many organisations coming forward to take part in our networks and events to embed kindness within their organisations.

Across the UK, there was a growing recognition that government policy has failed to respond adequately to the effects of economic and other forces and has left some places behind. Our Flourishing Towns programme was well-placed to support policy makers in determining how this might be

reversed. We have cemented our reputation as advocates for towns this year through investment in this work, as well as in the data-driven project Understanding Welsh Places, which was launched in October at a Parliamentary and Ministerial event in Cardiff.

The nature and quality of work is an important determinant of wellbeing, and our focus on this agenda intersected with our interest in place in 2019 through our work with the Living Wage Foundation and Poverty Alliance to launch the Living Wage Places scheme across the UK. We were understandably delighted when our neighbour in Fife, Glenrothes, became the UK's first Living Wage town in August. We know from our previous research in this area that there are other significant determinants of the quality of work, which also have an important influence on wellbeing. We have been able to maximise the value of this earlier collaboration with the RSA by leading a new project and publication on good work and productivity; research on good work and mental health, and contributions to the debate in the Republic of Ireland about the Government's Future Work Strategy.

Within the same workstream, we continued our work in 2019 to widen access to more affordable credit for those on low incomes, excluded from mainstream financial services. We have been encouraged by the way in which the case for accessible and quality services has gathered

momentum this year, and we have worked closely with Fair 4 All Finance, feeding into their theory of change and the development of their pilot programme for affordable credit providers.

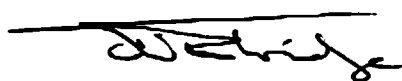
Digital technology has an increasing influence over all dimensions of wellbeing and our Annual Review last year recorded the work undertaken to develop a new regulatory model to tackle online harm. In 2019, our advocacy on this subject intensified considerably, reflected in a UK Government White Paper which drew heavily on the model proposed by the Trust, and culminating in preparations for the introduction of a Private Member's Paving Bill in the final days of the year. One of the fruitful partnerships that the Trust has pursued in recent years has been that with the UK Public Library sector. In 2019 we continued our work to support the sector's strategic development agenda, recognising the contribution that libraries can make to wellbeing at personal, community and societal level.

The final events marking the centennial of Andrew Carnegie's death were held in New York in October, when all the Carnegie Institutions came together for their biennial business meeting and to award the Carnegie Medals of Philanthropy. It was an opportunity for each institution to set out its strategic operating context for the 5 years ahead and to reflect on the ways in

which our individual missions, while varied and distinctive, are all influenced by global trends such as environmental degradation, social inequalities, and rapid technological change. Towards the end of 2019, Carnegie UK Trustees embarked on the early stages of our own Strategy Review, a process which will gather pace as we go through 2020 and look back on the 2016-2020 Strategic Plan period as a whole, and forward to the future. We look forward to engaging many of our partners, stakeholders and peer group in that exercise.

We are writing this retrospective piece at a time when the Covid-19 crisis is preoccupying us all and changing almost every aspect of our daily lives as individuals, communities and countries. It clearly also has implications for the work of the Trust now and in the future. As well as contributing now, where we are best placed to do so, we will be alert to the opportunities for the future and the ways in which an organisation dedicated to improving the wellbeing of the people can best challenge and support the rebuilding and renewal which is to come.

The ongoing work of the Trust is of course underpinned by the dedicated contribution of our talented staff team, Trustees, Associates and partners. We are grateful to them all for everything that they do and look forward to continuing these highly productive relationships in the year ahead.



**Sir John Elvidge, Chair of Trustees**



**Sarah Davidson, CEO**

# 2019 Wrapped Up



**325,000+**  
page views on  
our website



**30,000**  
report  
downloads



**20,000+**  
blog readers



**80**  
events delivered



**100+**  
public  
presentations



**25,000+**  
film views



**1/2**  
of all UK libraries  
apply for Engaging  
Libraries



**9**  
stories of UK  
'turnaround towns'



**16**  
essays on  
good future jobs  
in Ireland



**4**  
report cards on  
progress to an  
Enabling State



**3**  
#NotWithoutMe  
'Labs' on digital  
safeguarding



**100+**  
participants in  
our Kindness  
Innovation Network

# Our partners in 2019

- Your Own Place
- Revealing Reality
- Digital Access For All
- Good Things Foundation
- Glasgow City Council
- Luminare
- Wellcome
- Wolfson Foundation
- National Co-ordinating Centre for Public Engagement
- CILIP
- Libraries Connected
- Arts Council England
- British Library
- Fair4All Finance
- Living Wage Foundation
- Poverty Alliance
- Scottish Basic Income Steering Group
- Institute for Employment Research
- RSA
- UCL
- Operation Black Vote
- TASC
- Armagh City Banbridge and Craigavon Borough Council
- Derry City and Strabane District Council
- Lisburn and Castlereagh City Council
- Stratagem
- Scottish Government
- Welsh Government
- Kindness Innovation Network
- North Ayrshire Council
- Better Way
- Civil Exchange
- Esmee Fairbairn Foundation
- The Wheel
- Newcastle University
- Civic Universities Network
- Institute for Welsh Affairs
- Cardiff University
- Centre for Local Economic Strategies
- Abram Ward Community Cooperative
- Atmos Totnes
- Causeway Coast and Glens Council
- Ceredigion Association of Voluntary Organisations
- Ceredigion County Council
- Cymdaithas Cynnal y Cyfnogi Cefn Gwlad Cymru (4CG)
- Hull and Humber Chamber of Commerce
- Incredible Edible Todmorden
- Lancaster City Council
- Midsteeple Quarter
- North East Lincolnshire Council
- The Culture House
- The Exchange CIC
- The Federation of Small Businesses
- The King's Fund
- The Stove
- West Kilbride Community Development Group
- West Kilbride Community Initiative Limited
- Wigan Council
- Castle Community Bank
- 1st Alliance (Ayrshire) Credit Union
- Kingdom Community Bank
- East Kilbride Credit Union
- Kingdom Credit Union
- Community Places
- Calderdale Libraries
- City of London Libraries
- Falmouth Art Gallery and Library
- Fife Cultural Trust
- Glasgow Libraries
- Libraries NI
- London Borough of Camden
- London Borough of Hammersmith and Fulham
- London Borough of Sutton
- Manchester City Council
- Treorchy Library
- Western Isles Libraries
- West Lothian Council
- Sounddelivery
- University of Essex
- Town and Country Planning Association
- Involve
- London Borough of Bexley
- Oldham Libraries
- Powys County Council
- Wakefield Libraries
- Vision Redbridge Culture and Leisure
- Treorchy and District Chamber of Trade
- Coast and Vale Community Action

# Enabling Wellbeing

Improving wellbeing has been at the heart of our work for over 100 years. Today, we promote a number of strategic approaches to policy and practice development to enhance wellbeing outcomes for people.

In 2019 our Enabling Wellbeing projects continued to focus on the following key areas of activity:

- Supporting governments at all levels to develop and use wellbeing frameworks to understand and improve societal wellbeing.
- Promoting the power of kindness to transform communities and services to improve wellbeing.
- Supporting public service reform by encouraging the shift towards an enabling state.
- Promoting evidence exchange across the UK jurisdictions and understanding co-produced evidence.



# Wellbeing frameworks

Building on over 8 years of work, 2019 saw a step change in the level of our involvement in discussions on wellbeing frameworks in Scotland, England and internationally. The advocacy developments from 2018 brought our work to a wider audience. In 2019 we built on this by clarifying our key policy recommendations and began to see these being implemented.

We continued our major programme of work on Embedding Wellbeing in Northern Ireland. This project works with three local authorities to support the development of Community Planning to pursue wellbeing outcomes. The three local authorities are: Armagh City, Banbridge and Craigavon Borough Council; Derry City and Strabane District Council; and Lisburn and Castlereagh City Council. In 2019 we focused on linking our partners to best practice in Wales and settling on the key project deliverables for direct support. In particular, the project participants are receiving support from the Trust on facilitating co-production and shared leadership within and outwith their formal Partnership structures in delivering their Community Plans.

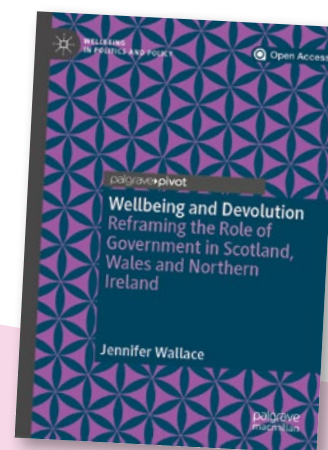


© Natasha Hirst Photography

We have built into the project a peer-to-peer support model in which the project participants come together formally at least once a year during the project's three-year duration to discuss common challenges, and commit to reporting out to their counterparts in other Community Planning Partnerships across Northern Ireland. In 2019, they met to discuss their experiences of producing the first Statement of Progress on community planning.

Alongside this work with the three local authorities we have developed

an Embedding Wellbeing support network to harness the enthusiasm and expertise of stakeholders who are supportive of the project, for project participants and the wider Community Planning Partnerships across Northern Ireland to utilise throughout the duration of the programme.



Outside of Northern Ireland we were delighted to launch our Wellbeing and Devolution book at the Houses of Parliament, while in Scotland, we have been working with the Children's Sector Strategy and Policy Forum to explore the potential of moving towards wellbeing budgeting by life stage.



© Hannah Ormston, CUKT

# Kindness

This year marked the third year of our programme on kindness. Our goals for 2019 were to shift from understanding what is required to promote community kindness, to understanding better the policy and practice levers for promoting radical kindness in public services.

We launched our report *The Practice of Kindness*, and accompanying short film to bring together learning on the practical implementation of kindness. These outputs are based on our work with the Kindness Innovation Network and our partnership with North



© Ben Thurman, CUKT

Ayrshire Council to develop and test ideas to embed kindness in communities, organisations and services.

We continued our partnership with North Ayrshire Council to further explore the challenges and complexities of kindness as an organisational value. The Council's focus on kindness is about recognising that relationships between people in communities and between citizens and service providers are just as important as transactions. At the end of 2019, North Ayrshire Council formally adopted the Kindness Promise,

a pact between the council, its partners and the community.

We have undertaken a significant programme of advocacy activity, building strong stakeholder relationships with organisations across government and civil society throughout the UK. This includes ongoing engagement with the Scottish Government on making the connection between the value of kindness in the National Performance Framework and other areas of policy development. In Wales, we worked with Jack Sargeant AM to inform a debate in the Welsh Assembly.



© Tim Gray

# Enabling State

We continued our partnership with the Better Way Network in 2019. This network of social activists from the voluntary sector and beyond shares ideas, knowledge and inspiration about how to improve services and build stronger communities. The network is hosted by Civil Exchange and also supported by the Esmée Fairbairn Foundation, who recently re-committed funding, alongside CUKT.

In November 2019 the Network published their Call to Action, the result of three years of discussion within the network. It sets out steps that can be taken in four areas – sharing power, changing practices, changing organisations and collaborative leadership – and gives examples from across the network of how to do so. By the end of 2019, the Network had more than 500 members across 14 ‘cells’ in England, grouped by geography and theme.

Also, in November 2019 we published *Participating People: Enabling Active Citizenship in Twenty-first Century Ireland*.



© The Wheel

This is the final report of the multi-year programme with The Wheel on active citizenship in Ireland. It presents a blueprint of actions to support a more inclusive Ireland with a vision to create a more Enabling State. The report was well received by the sector at a launch event in Dublin.

Our final key output during this strategic plan on the Enabling State was the publication of a suite of report cards for the UK. The report cards assess progress since our initial review in 2013.



# Interaction

We continued our work in this field in 2019, publishing a new report ‘*The many shades of co-produced evidence*’, which sets out our thinking on involving different sectors in the co-production of knowledge between researchers and citizens.

We partnered with Newcastle University to develop understanding and support for co-creation of knowledge between the third sector, private sector, universities and statutory sector. We produced a range of materials including two videos on co-production, where stakeholders gave a variety of perspectives on the importance of being involved in the process of developing evidence for policy and practice.

We formalised our relationship with the Civic Universities Network by joining the Civic Universities Commission Working Group and committing funding to the establishment of a network hub. We were also invited to join the University of Newcastle International Advisory Board for the Institutes of Social Science and Humanities, the SCDC advisory group for Knowledge is Power programme and the National STEM Forum.



# Digital Futures

**Our Digital Futures work seeks to maximise the benefits and mitigate the risks that digital technology can have for personal, community and societal wellbeing.**

**Our projects in 2019 focused on four specific areas of activity:**

- Increasing opportunities for disadvantaged or excluded groups to benefit from digital technology.
- Tackling potentially problematic issues where digital can have a negative impact on wellbeing.
- Supporting the development of good digital public services which can deliver the desired outcomes.
- Supporting the strategic development of public libraries across UK and Ireland, recognising the significant contribution libraries can make to this agenda and building on the Trust's unique and historic library legacy.

# Increasing opportunities for disadvantaged or excluded groups to benefit from digital technology

In 2019 we continued our focus, through our #NotWithoutMe project, on supporting disadvantaged young people in the UK to become more digitally included and to have greater opportunity to engage digitally in a safe and effective way.

We published the final report from the research study we supported with Glasgow City Council on Digital Resilience, Inclusion & Wellbeing For Looked After Children & Young People, which has generated interest from a range of local authorities and youth organisations.

Building on the work in Glasgow, we launched our #NotWithoutMe Labs programme in 2019 to explore the intersections between safeguarding, kindness and digital. This programme, involving a series of workshops in London, Glasgow and Cardiff brought together representatives from organisations across the UK working with children and young people to examine the

effectiveness of organisational policies on how digital technology should be used to support young people. The final report from this work will be published in early 2020.

In early 2019 we announced Your Own Place, a Norfolk-based social enterprise working with young people at risk of homelessness, as the successful organisation from our #NotWithoutMe Accelerator programme. We worked with Your Own Place throughout 2019 as they implemented their Accelerator project, embedding digital components to all 24 of their Tenancy and Independent Living Skills modules. We also worked with the Your Own Place team to share their development process throughout the year, through a series of blogs. An external evaluation of the Accelerator process has also been undertaken during 2019 with the Accelerator participants and the previously pilot funded #NotWithoutMe projects. This will be published in 2020.



© Anna Grant, CUKT

We added a further dimension to our work on improving digital access for disadvantaged young people in the UK in 2019 by accepting an invitation to join the cross-sector Digital Access for All partnership, which aims to make digital technology available at home to all school-age children in the UK. We wrote and published the 'Switched On' report highlighting the scale of the challenge to be overcome; and established and led the Data sub-group of the partnership throughout 2019.

We began work in 2019 to examine the digital inclusion needs of people in the UK who have little to no English language or literacy, another group often experiencing particular disadvantages, yet not often included in policy responses. We have built a new partnership with Good Things Foundation, the largest digital skills charity in the UK, to examine this issue through a research study and a series of workshops in England, Scotland and Wales. The final reports will be published in early 2020.

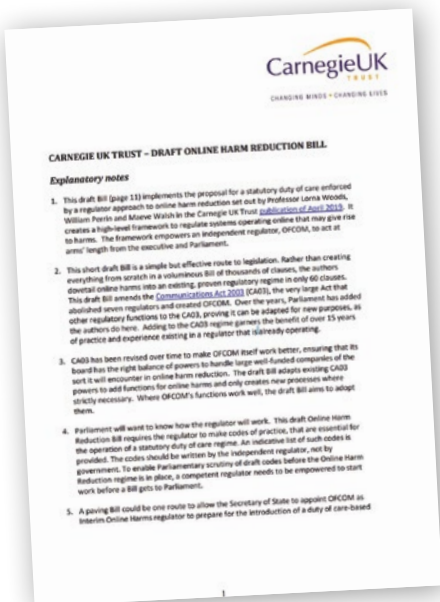


© Anna Grant, CUKT

# Tackling potentially problematic issues where digital can have a negative impact on wellbeing

The harmful impact that digital technology can have on wellbeing continued to become more widely recognised in 2019. We continued our work throughout the year, led by our Trustee Will Perrin working with Professor Lorna Woods at the University of Essex and Carnegie Associate Maeve Walsh, to advocate for a new regulatory system to tackle online harm, underpinned by the concept of a ‘duty of care’ backed by an independent regulator.

Our outputs included: publication of a full report, setting out all aspects of the duty of care model; multiple responses to government consultations; a short animation film; a paper on duty of care and fundamental freedoms; and our own draft online harm reduction bill.



We also undertook a significant advocacy programme, including stakeholder engagement, parliamentary evidence and briefings, media liaison and international engagement, including giving evidence to the International Grand Committee on Disinformation and Fake News. A key activity which began in December 2019 was our work with Lord McNally on a Private Member’s Bill.

The project has secured significant traction during the year. Most significantly the UK Government published its White Paper on reducing online harms, proposing a statutory duty of care, enforced by a regulator, which drew heavily upon the model proposed by the Trust.

In addition to our work on regulation to tackle online harm, we continued our work in 2019 on how individuals can protect their privacy online. Our ‘Leading the Way’ Guide was highlighted as a good practice resource by a number of organisations, while we were very pleased that Libraries Northern Ireland has implemented a number of changes in 2019 drawing on this work. We continue to seek partnerships with library leadership institutions to further embed this work across the library sector and this will continue in 2020.



## Supporting the strategic development of public libraries across UK and Ireland

In 2019 we continued our work to support the strategic development of public libraries, to help them maximise their contribution to improving wellbeing.

With support from external funding secured from Wellcome and the Wolfson Foundation, we launched the second phase of our Engaging Libraries programme in 2019. The aim of this phase is to support libraries to deliver public engagement activities that connect citizens with research in the themes of health, society and culture. We designed and launched the programme this year and received more than 100 applications to take part,

comprising half of all UK public library services, with more than £2.5 million of funding sought. Following a rigorous selection process, 14 projects were awarded funding, representing libraries in all four UK jurisdictions. We have put in place a number of resources to support project delivery, including a 6-part development programme to work with the participating libraries on key issues such as strategy, marketing, evaluation, partnership working and applying for funding.

During 2019 we published, in partnership with CILIP and Libraries Connected, a new report setting out 'a blueprint for public library development and sustainability in England'. This strategic document sets out how the different institutions working on public libraries in England should work together to achieve a set of shared aims.



© Georgina Bowyer, CUKT

Our third and final cohort of Carnegie Library Lab participants completed their projects in late 2019, with these projects having engaged 1,300 people and supported 40 library staff to undertake training and develop new skills. An evaluation of the impact of the full Library Lab programme will be published in 2020, when we will also launch a number of legacy initiatives, including embedding a revamped version of the Library Lab online learning programme within CILIP's resources.

## Supporting the development of good digital public services which can deliver the desired outcomes

We have been working with the British Library, in partnership with Arts Council England, on a major exploratory project for a single digital platform for public libraries. We published the project's first phase report in 2019, which was positively received. Arts Council England have now committed additional funding to extend and enhance for the project's second phase, which will complete in early 2020, including detailed technical, governance and financial models.

We published a follow up report to our 2018 work on data sharing in 2019, entitled 'Involving the Public in Robust Data Sharing', setting out the rationale and potential process for how citizens might be engaged in designing data sharing initiatives, to build public trust, resilience and confidence.

During 2019 we have taken part in a series of workshops led by the Scottish Government on the actions that Scotland should take to deliver on the Programme for Government commitment for Scotland to become an 'ethical digital nation'. We will continue our engagement in this area in 2020.



# Flourishing Towns

**As a town-based policy and practice organisation, we wish to support the development of positive wellbeing outcomes in towns across the UK and Ireland.**

**In 2019 our work to advance our theme of Flourishing Towns has focused on:**

- Advocating for towns as a distinct geography for public policy.
- Developing the use of data around towns.
- Exploring the concept of storytelling for towns.



# Turnaround Towns

We began the year by publishing our short paper on Opportunities for Towns, which received positive feedback from MPs and other stakeholders and we have built and cemented a range of key stakeholder relationships across the sector throughout the year.

We produced our Turnaround Towns UK report in 2019, which brings together nine stories of towns throughout the UK who are working to bring about

transformational change in their places. The towns featured are West Kilbride and Dumfries in Scotland; Portrush in Northern Ireland; Cardigan in Wales; and Morecambe, Todmorden, Grimsby, Wigan and Totnes in England. Their innovative approaches include hosting festivals; restoring castles as tourist attractions; commissioning films; reclaiming a high street; embracing industrial change; and even ‘guerrilla gardening’.

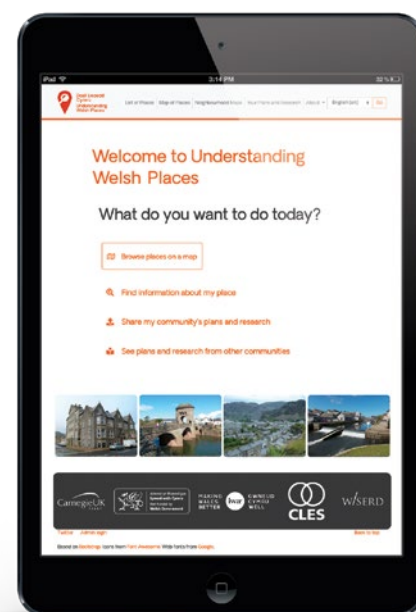


# Understanding Welsh Places

Understanding Welsh Places is a website that produces statistical information about towns and communities in Wales. During 2019 we worked with representatives from the public, private and third sectors and have consulted with people from across Wales to on the content and design of the website. The project is match funded by the Welsh Government and managed for us by the Institute for Welsh Affairs.

The website has been built by a team led by staff from the Wales Institute of Social and Economic Research, Data and Methods (WISERD) at Cardiff University, with additional data processing and analysis provided by the Centre for Local Economic Strategies. The website has also been shaped by a core cross-sector group of interested people and a sub-group of data experts.

We launched Understanding Welsh Places at the National Assembly for Wales’ Pierhead Building in Cardiff Bay on 8th October. The event was sponsored by Dai Lloyd AM (Plaid Cymru), Member for South Wales West and the delegates also heard from Hannah Blythyn AM (Labour), Deputy Minister for Housing and Local Government, Welsh Government.



# Talk of the Town

Talk of the Town draws on our international case study research of towns which have turned around their fortunes, and found that a clear narrative was an important part of their success.

Exploring how the concept of storytelling can support the development of towns across England and Wales, the Trust opened an application process for towns to receive support to plan, develop and present the story of their town. The story would then be presented at an event attended by local decision-makers and a discussion facilitated on how it can be used to inform the towns' future development.

The call for applications was launched in September 2019, and we received 29 applications from towns in England and Wales. An internal panel scored the applications and Scarborough and Treorchy were chosen to receive the expert storytelling support, as towns that could provide valuable learning to wider coastal and Welsh Valley towns. Both towns brought members of the community, public, private and voluntary sectors together to receive their storytelling support, and began planning their public events.



© Pippa Coutts, CUKT



© FFILM Productions

# Fulfilling Work

**Our access to and experience of work has a fundamental impact on our wellbeing, across critical issues such as income, sense of purpose, connectivity, identity and agency.**

**In 2019 our projects within our Fulfilling Work theme continued to focus on three areas of activity:**

- Improving the financial position of workers.
- Supporting place-based interventions to improve work.
- Supporting strategic interventions to make 'better quality' work available to more people.

## Improving the financial position of workers

We continued our work in 2019 to widen access to more affordable credit for those on low incomes, excluded from mainstream financial services.

We built a positive working relationship with Fair 4 All Finance, the new body set up by the UK Government to administer £55 million of dormant bank account monies allocated to improving access to affordable credit. We have worked closely with the Fair 4 All Finance team throughout the year, feeding into their theory of change and the development of their pilot programme for affordable credit providers. We dedicated a significant portion of time from our Carnegie

Associate Niall Alexander to work as an embedded part of the three-person team established by Fair 4 All Finance to carry out comprehensive due diligence work with the five organisations participating in the pilot.

Within our affordable credit programme this year we secured the participation of seven local authorities in Scotland to participate in a new research study examining the supply and demand of credit in their areas. The study will conclude in early 2020. We continued to undertake a wide-ranging programme of stakeholder engagement and advocacy

activities, including meetings with government ministers; multiple conference and event presentations; and consultation responses.

Alongside our affordable credit activity we have continued to support our Credit Union Payroll project in 2019, extending access to savings and affordable loans to workers. Five credit unions across Scotland are participating in the consortium that we have convened to deliver the initiative and the number of employers now signed up to work with these credit unions is double the pre-project baseline.

## Supporting place-based interventions to improve work

We were very pleased to work with the Living Wage Foundation and Poverty Alliance in 2019 to launch the Living Wage Places scheme across the UK. The scheme enables cities, towns, 'zones' and buildings to become accredited Living Wage Places, led by a local action group representing employers from different sectors and with ambitious targets for increasing the number of accredited Living Wage employers in the area. The Trust



previously supported a feasibility study to scope the potential and parameters of the initiative and we supported its launch this year.

Dundee was announced as the UK's first Living Wage city in 2019, Glenrothes was announced as the UK's first Living Wage town; and International House in Brixton as the first Living Wage Building. The Living Wage Places scheme was the focus of Living Wage Week in November 2019 and a number of other areas

have since become accredited, including Bristol, Cardiff and Salford.

We published a toolkit in 2019, in partnership with Living Wage Foundation and Living Wage Scotland, to support places on their journey to Living Wage accreditation.

Our 2018 Making Procurement Work for All report examined the barriers and opportunities for using public sector procurement to improve the quality of jobs in

the UK by rewarding companies able to demonstrate that they met certain 'good work' criteria. We continued to advance this agenda in 2019, working with our partners at Durham University, securing positive developments at both national and local level. We published UK and North East-specific 'Guides to Good Work Procurement' in 2019.

Finally in this area, we published a report on international learning on the delivery of 'Citizens Basic Income' schemes in 2019, as part of work that four Scottish local authorities undertook to help inform the development of their own CBI pilot project.



## Supporting strategic interventions to make 'better quality' work available to more people

A significant part of our work this year has been to increase the prominence of 'good work' within other relevant and important policy agendas.

A major project that we have delivered in this regard in 2019 has been our good work and productivity project, which has sought to explore how improving the quality of work available to employees can improve business productivity while also delivering significant wellbeing gains for workers. We have built an expert working group to support us in this project, including senior representatives from the business

sector, trade unions, academia, and policy organisations. The outputs from the project were delayed slightly due to the December General Election but will be published in early 2020. These will include new research studies by the RSA and Warwick University Institute for Employment Research; plus essays from all expert group members and other contributors.

We have also undertaken work this year to connect good work and mental health, with a particular focus on ethnic minority groups in precarious employment. A new research study on this issue, which we have undertaken jointly with



© Gail Irvine, CUKT

UCL and Operation Black Vote, will be launched in the House of Lords in early 2020, having also been delayed by the General Election. In Ireland, we published an essay collection 'Ensuring Good Future Jobs' in 2019, in partnership with TASC. The collection was a response to the Irish Government's Future Jobs strategy, launched in 2019, which has a welcome focus on future employment trends but is more limited in its proposals about improving the quality of jobs across all sectors of the economy. Contributors to the collection included the Irish Congress of Trade Unions, Business in the Community in Ireland, National Youth Council of Ireland and the National Women's Council of Ireland. The report was launched at a successful event in Dublin, featuring a speech from Senator Alice Mary Higgins.



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# Trustees, Staff and Advisers

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William Thomson CBE

## Trustees

Sir John Elvidge (*Chair*)

Dame Diana Brittan\* (*Vice Chair*)

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Jane Livingstone

Megan Mathias

Janet McCauslin MBE

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David Walker\* (*Convenor of Finance and Corporate Services Committee*)

Ian Wilson\* (*Convener of Audit and Risk Committee*)

\**Audit and Risk Committee Members*

## Chief Executive

Martyn Evans (*until April 2019*)

Sarah Davidson CB (*from August 2019*)

## Staff

Georgina Bowyer – Policy and Development Officer

Pippa Coutts – Policy and Development Manager

Anna Grant – Senior Policy and Development Officer

Rachel Heydecker – Policy and Development Officer

Gail Irvine – Senior Policy and Development Officer

Alison Manson – Corporate Services Officer (*until March 2019*), Senior Corporate Services Officer (*from March 2019*)

Rebecca Munro – Corporate Services Officer (*until March 2019*), Senior Corporate Services Officer (*from March 2019*) (*Maternity Leave from May 2019*)

Genna Nelson – Corporate Services Officer

Hannah Ormston, Policy and Development Officer (*from May 2019*)

Jenny Peachey – Senior Policy and Development Officer

Lauren Pennycook – Senior Policy and Development Officer

Issy Petrie – Policy and Development Officer

Liz Pullar – Finance Assistant

Lucy Smith – Senior Corporate Services Officer

Lauren Speed – Events and Communications Officer

Steven Thompson – Finance & Corporate Services Manager

Ben Thurman – Policy and Development Officer

Jennifer Wallace – Head of Policy (*Joint Interim Chief Executive from April to August 2019*)

Douglas White – Head of Advocacy (*Joint Interim Chief Executive from April to August 2019*)

## Carnegie Fellows

Angus Hogg MBE – International Fellow

Julia Unwin CBE

## Carnegie Associates

Niall Alexander

Phillip Edwards

Zoe Ferguson

Tom Forrest

Dr Deborah Harrison

Dr Elizabeth Kelly

Cliff Manning

Katie Pekacar

Caroline Slocock

Maeve Walsh

Andy Wright

Steve Wyler

## Advisers

### External Auditor

Chiene + Tait LLP

### Investment Managers

Cazenove Capital Management Ltd

### Legal/Professional Advisers

Lindsays LLP

Anderson Strathern LLP

Mason, Hayes and Curran

### Pension Advisers

LEBC Group

### Public Affairs/Relations

Grayling (UK) Scotland

### HR Advisers

VerusHR Ltd

# Financial Review

## Income

Total income for 2019 was £2.19 million (£1.65 million - 2018). Unrestricted fund income totalled £1.56 million (£1.53 million - 2018). Restricted fund grant income was received from the Wellcome Trust £225k (£13k - 2018) and the Wolfson Foundation £250k (£nil - 2018) for the Engaging Libraries project. Further Restricted fund grant income was received from the Welsh Government of £40k for the Understanding Welsh Places project. Restricted fund partnership funding of £88k was received from Luminate for work on the Trust's Social Harm Reduction project and donation income of £24k (£31k - 2018) was received from F.Perrin also for work on the Trust's Social Harm Reduction project.

## Expenditure

Expenditure for 2019 was £2.50 million (£2.48 million - 2018).

The Trust expended £2.16 million from unrestricted funds (£2.20 million - 2018) with £2.12 million (£2.16 million - 2018) expended directly on its Charitable Activities, with the main area of expenditure being Policy and Development activities £1.93 million (£1.99m - 2018). Further unrestricted grant payments of £39k (£152k - 2018) were made.

The Trust expended £296k (£241k - 2018) from Restricted Funds with £250k (£104k - 2018) expended on specific Policy and Development projects and further restricted grant payments of £46k (£137k - 2018) being made.

Net expenditure before Gains/ (Losses) on Investments for the year was £312k (£825k - 2018). This was a planned deficit funded from a transfer approved by Trustees, from the unapplied fund element of the Trust's endowment fund, a fund set up in November 2014 to support the Trust's strategic plan 2016 - 2020 and its total return approach to investments.

## Investment Policy and Performance

The Trust's Discretionary Fund Manager, Cazenove Capital Management Ltd have a remit of growing both Capital and Income from the Trust's Investment Portfolio.

The main risk to the level of income received and market value of the Trust's Investments is the volatility of financial markets. The Trust mitigates against investment risk through its Statement of Investment Policy and delegates investment decisions to their Discretionary Fund Managers, Cazenove Capital Management Ltd, within agreed investment objectives, asset allocations and performance benchmarks, set by the Trust. The Trust's Board reviews investment performance against an agreed set of performance benchmarks on a quarterly basis, at their Board meetings. Overall Trustees are content with the performance of its Investment Portfolio in 2019 as measured against its benchmarks.

The Trust adopts a total return approach to investments. In order to provide future funding to achieve

certainty, stability and sustainable growth over the period of the next strategic plan 2016-2020, Trustees made the decision at the end of 2014, to de-risk the unapplied total return element of its investment portfolio by investing in low risk UK Gilts and Multi-Asset funds.

The Trust's investment portfolio currently retains 45% of its value in M&G Charifund Units, a UK equity based fund, and 55% in a mixed portfolio of UK and non UK equity funds and bonds. The Trust Investments are governed by its Statement of Investment Policy.

The value of the Trust's investments at 31 December 2019 were £41.97 million (£37.62 million - 2018). Income distributions relating to the Trust's investments in the year were £1.49 million (£1.51 million - 2018). The Trust continues to monitor the stock market and its impact on the endowment and its related income stream.

In 2020, financial markets have been turbulent and the value of the Trust's investments at 30 April were £36.52 million.

Since the year end the Trust has faced a new challenge relating to COVID19. The Trustees are reviewing all aspects of the ongoing needs of the Trust. Whilst there are short term implications to reduction in investment income and the value of investments the Trust is well placed to support all activities due to the ongoing positive cash flow and reserves and as a consequence continues to be a going concern.

### Grant Making Policy

The Trust's charitable activities now focus on proactive initiatives capable of influencing public policy and social change. Grants awarded are based on competitive selection, where partners are identified to take forward demonstration and/or research commissioned by the Trust to further its strategic work. The Trust no longer accepts unsolicited grant applications.

### Reserves Policy

The Reserves policy set by Trustees is intended to retain sufficient operational expenditure in relation to its business continuity and contingency planning whilst also protecting the Trust from unexpected fluctuations in income from its investment portfolio over its five year strategic plan.

The Other Charitable Fund Reserve is an unrestricted fund, corresponding to sums accumulated from historical

surpluses of income over expenditure, which Trustees are free to use in accordance with the charitable objects of the Trust.

The appropriateness, purpose and level of reserves is reviewed by Trustees annually reflecting on expenditure decisions made, future workplans, partnership working and future income and capital growth forecasts.

In addition to the Other Charitable Fund Reserve held at 31 December 2019 of £2.02 million (*£1.71 million – 2018*), the Trust also held Restricted Funds of £447k (*£116k - 2018*) and Designated Funds of £1.53 million (*£1.87 million – 2018*).

The Trust also holds an Endowment Fund which was originally gifted by Andrew Carnegie in 1913. The Value of this fund at 31 December 2019 was £41.56million (*37.20 million – 2018*). The income from this fund is treated as unrestricted.

### Trustees' Statement on Summary Accounts

The summary of accounts set out on pages 23 and 24 have been extracted from the full financial statements of the Trust which were approved on 20 May 2020 and do not constitute the Trust's statutory full financial statements. The full financial statements have been audited and the auditor's opinion was unqualified.

These Summary accounts may not contain sufficient information to allow for a full understanding of the financial affairs of the Trust. For further information, the full financial statements, the auditor's report on these statements and the report of the Trustees should be consulted. Copies of the full financial statements can be obtained from the Trust's office.



# Summary Accounts

## Statement of Financial Activities

Year to 31 December 2019

	Unrestricted Funds £	Restricted Funds £	Endowment Fund £	2019 Total £	2018 Total £
<b>Income and Endowments from:</b>					
Investments	1,486,755	-	-	1,486,755	1,512,138
Donations and Legacies	-	23,750	-	23,750	31,250
Charitable activities	-	603,000	-	603,000	85,500
Other Trading Activities	74,944	-	-	74,944	21,415
<b>Total</b>	<b>1,561,699</b>	<b>626,750</b>	<b>-</b>	<b>2,188,449</b>	<b>1,650,303</b>
<b>Expenditure on:</b>					
Raising funds	41,189	-	41,189	82,378	72,597
Charitable activities:					
Policy and Development	1,934,089	295,911	-	2,230,000	2,232,343
Charitable Initiatives	56,773	-	-	56,773	37,687
Other Charitable Activities	130,860	-	-	130,860	132,652
<b>Total</b>	<b>2,162,911</b>	<b>295,911</b>	<b>41,189</b>	<b>2,500,011</b>	<b>2,475,279</b>
<b>Net (Expenditure)/Income before (Losses) on Investments</b>	<b>(601,212)</b>	<b>330,839</b>	<b>(41,189)</b>	<b>(311,562)</b>	<b>(824,976)</b>
<b>Gains/(Losses) on Investments</b>					
Realised	-	-	389,164	389,164	(148,946)
Unrealised	-	-	4,593,725	4,593,725	(3,653,366)
<b>Net (Expenditure)/Income</b>	<b>(601,212)</b>	<b>330,839</b>	<b>4,941,700</b>	<b>4,671,327</b>	<b>(4,627,288)</b>
Transfer to unrestricted funds	578,431	-	(578,431)	-	-
<b>Net Movement in Funds</b>	<b>(22,781)</b>	<b>330,839</b>	<b>4,363,269</b>	<b>4,671,327</b>	<b>(4,627,288)</b>
Reconciliation of Funds:					
Total funds brought forward	3,579,328	115,673	37,196,092	40,891,093	45,518,381
<b>Total funds carried forward</b>	<b>3,556,547</b>	<b>446,512</b>	<b>41,559,361</b>	<b>45,562,420</b>	<b>40,891,093</b>

# Summary Accounts

## Balance Sheet

As at 31 December 2019

	2019		2018	
	£	£	£	£
<b>FIXED ASSETS</b>				
Tangible fixed assets		871,730		910,725
Investments		41,974,375		37,619,464
Social Investments		1,006,466		1,001,772
<b>Total fixed assets</b>		<u>43,852,571</u>		<u>39,531,961</u>
<b>CURRENT ASSETS</b>				
Debtors	104,254		220,336	
Investments	789,941		1,070,348	
Cash at bank and in hand	1,191,943		289,030	
<b>Total current assets</b>		<u>2,086,138</u>		<u>1,579,714</u>
<b>LIABILITIES</b>				
Creditors: amounts falling due within one year	(376,289)		(220,582)	
Net current assets		<u>1,709,849</u>		<u>1,359,132</u>
<b>Total net assets</b>		<u>45,562,420</u>		<u>40,891,093</u>
<b>THE FUNDS OF THE CHARITY</b>				
Endowment funds		41,559,361		37,196,092
Restricted income funds		446,512		115,673
Unrestricted funds:				
Designated funds		1,531,884		1,870,134
Other charitable funds		2,024,663		1,709,194
<b>Total charity funds</b>		<u>45,562,420</u>		<u>40,891,093</u>

Approved by the Trustees on 20 May 2020 and signed on their behalf by:

**SIR JOHN ELVIDGE**

Chair of Trustees

**IAN WILSON**

Convenor of Audit and Risk Committee



The Carnegie UK Trust works to improve the lives of people throughout the UK and Ireland, by changing minds through influencing policy, and by changing lives through innovative practice and partnership work. The Carnegie UK Trust was established by Scots-American philanthropist Andrew Carnegie in 1913.

**Andrew Carnegie House**  
**Pittencrieff Street**  
**Dunfermline KY12 8AW**

**Tel: +44 (0)1383 721445**

**Email: [info@carnegieuk.org](mailto:info@carnegieuk.org)**



**[www.carnegieuktrust.org.uk](http://www.carnegieuktrust.org.uk)**

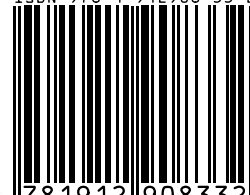
May 2020



CHANGING MINDS • CHANGING LIVES

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