

Concept note

Shaping the Future: Leadership initiative pooled fund Migration Exchange (MEX), December 2024

1. Summary

Migration Exchange (MEX) is embarking on a three-year initiative aimed at addressing critical challenges in leadership development. This will be a co-designed, pooled fund, distributed using a participatory grant-making approach, with a tailored strategy that aligns with sector needs.

The UK refugee and migration sector faces unprecedented challenges in the current political, economic, and social landscape. A strategic approach to leadership development is crucial to sustain impact and support the refugee and migration sector to bring about transformative change. We need leaders who can engage with complex challenges while firmly keeping a vision of the bigger picture and strategising for systemic change.

'Shaping the Future' Leadership Initiative seeks to bolster the leadership capacity and capability of organisations and networks in the refugee and migration sector. It aims to promote a holistic approach to leadership development, emphasising anti-oppressive practices, wellbeing, and sustainability while leveraging the inherent strengths found in field practice. It will do this by making resources available to organisations within the sector who would like to grow leadership capability and capacity among their teams and communities, especially those with lived experience of the migration system, and who would like to be able to tailor-make their own programmes or approaches.

2. Background

About Migration Exchange (MEX)

[Migration Exchange](#) is a UK-based charitable programme whose mission is to cultivate insight, connection and action across the UK refugee and migration field, working together with civil society to achieve positive change. We have two ultimate goals: an equitable, power-aware and intersectional funding landscape, better able to resource systems change, and a connected and action-focused refugee and migration sector, better able to drive systems change. We focus particularly on independent funders and charities to achieve this mission, connecting people through convening, events and a funder network. As well as commissioning research and analysis on trends and patterns, we develop and co-design responses to shared challenges and opportunities.

MEX's track record on leadership interventions

MEX has built expertise and experience in developing and bringing together leadership interventions in the refugee and migration field. Our projects are developed through research and understanding the needs of the sector. Past examples include the '[Leading Beyond Borders](#)' programme (2018-2022), borne out of a comprehensive review conducted by MEX and key stakeholders to identify the pressing leadership development needs. Following the success of the 'Leading Beyond Borders' programme and incorporating its learnings MEX conducted a deeper scoping on the current state of leadership provision in the sector, published in December 2022. We also held a sector wide convening on leadership (March 2022). In October 2024 after concluding our Equity Catalysts community of practice in June, we published a [report](#) on the successes, challenges and key recommendations from the project. Beside Shaping the Future, our other current leadership intervention is exploring the co-leadership structure in the MEX team. Below is more information about past and current projects.

3. Problem statement and proposed solutions

Our past and current projects have contributed to some good progress and outcomes, but there remain structural barriers and more work is needed to address the systemic leadership needs of the sector.

Our [2022 report](#) on this topic identified **three key priorities: address leadership development gaps, support well-being, and overcome barriers for those with lived experience**. This report and the convenings that followed underscored the ongoing need for focused leadership development in the migration sector in light of the hostile context, and MEX is actively responding to identified challenges. Importantly, sector feedback indicates a preference for a more bespoke approach to leadership development, rather than a standardised programme for the whole sector. This also requires a different approach to funding leadership work.

As a response, MEX is proposing Shaping the Future, a co-designed, participatory, pooled fund initiative, ensuring a tailored strategy that aligns with sector needs. The proposed initiative aims to empower leaders, enhance wellbeing, and break down barriers to leadership, ensuring a resilient and impactful refugee and migration sector in the face of current challenges. MEX urges funders, trustees, leaders, and supporters in the sector to collaborate in addressing these pressing issues.

4. Objectives

Shaping the Future leadership initiative has three main objectives:

- 1. Supporting organisations and networks' leadership development:** Provide support to organisations and networks to develop their leadership capacity and

capability.

2. Supporting holistic leadership development: Support approaches to leadership development which centre anti-oppressive practice, wellbeing and sustainability, build on the strengths and assets of field practice and support leaders to develop their knowledge and skill set in relation to systems change.

3. Creating impact beyond the initiative: Generate learning, insights, connections and shared action on leadership as well as the practice of participatory grant-making that ripple beyond the parameters of the initiative, informing wider funder and field practice.

With the funds we raise we aim to provide a flexible, accessible and equitable resource for leadership development in the refugee and migration sector. **The strategy, grant process and learning approach will be delivered through a participatory programme led by field experts with lived experience of migration and asylum.**

We envisage the initiative to run for a three-year period, and to leave a legacy of better connections, deeper understanding of the practice of leadership development, and improved access to funding from other funding streams. The initiative will aim to build a network of organisations, and cultivate shared insights. We will also document the journey of creating the fund and distributing the funds using participatory models, to make a case for funders to shift power in decision making.

5. Target grant partners

We have drafted parameters for the type of organisations and individuals that will be eligible to access funding through the initiative. This is based on consultation and information from the field collected through our workshops and research. We will refine the criteria with the Co-Creation Group.

The suggested parameters are:

- a. Charitable purpose organisations whose primary focus is migration and refugee issues in the UK.
- b. Organisations whose approaches are looking to improve collaboration, increase the power and agency of people with lived experience of the immigration system, have an intersectional lens, will be prioritised.
- c. Organisations showing a clear demonstration of interest in and/or active work in anti-oppressive, anti-racist, and feminist leadership practice.
- d. Organisations that want to provide space for leaders to learn about and apply system change approaches.

- e. Networks, collaborations and partnerships are welcome to apply, but this will not be a requirement and organisations can apply by themselves.
- f. Organisations that are intentional about making wider connections beyond the sector, tapping into the wider ecosystem of leadership for social change work
- g. Initiatives that are at early stages of development will be welcomed.

6. Approach

Roles, governance & accountability:

1. Global Dialogue (GD), a registered charity and funder intermediary specialist, will act as fiscal and administrative host for the pooled fund.
2. MEX, as a programme at GD, is accountable for the delivery, strategic oversight and coordination of the initiative.
3. MEX has established a Co-Creation Group to shape the initiative using participatory methods. The group is designing the funding priorities and choosing who to award grants to. The Group consists of people with lived experience of the migration system and migration and leadership
4. The GD Board will sign off grants, based on recommendations from the Co-Creation Group. Risk management and financial accountability will reside with Global Dialogue.

Participatory design

To determine the parameters of the Fund and selection of grant partners we are using a participatory design approach to facilitate the Co-Creation Group. A participatory design process enables us to bring together individuals with lived experience, knowledge and practice in the migration sector to inform how we approach the disbursement of the Fund.

By using participatory design, we are able to check our approach and assumptions about how to best administer the funds to ensure these align with the needs, interest and potential for impact sought by the sector. Working collaboratively through a participatory approach enables us to shift power from funders contributing to this pooled fund to a community of people at the forefront of leading change in migration issues. Building a community to shape the fund, disseminate the opportunity and select grant partners creates a shared sense of ownership and investment in the outcome and impact of the funding for the sector.

The Co-Creation Group consists of a diverse membership of individuals working across the migration sector and expertise in leadership to ensure a range of voices, experiences and insights to shape the approach and choose who should receive funding. By bringing this knowledge together we can build a more nuanced fund and select grant partners that will strengthen the migration sector for longer term impact ensuring the sustainability of their work.

The role of contributing funders

Contributing funders are invited to:

- share recommendations on how to manage participatory grantmaking approaches based on their experience
- advise on how MEX can provide a meaningful creation of a community of grant partners
- support MEX with recruitment of the Co-Creation Group by disseminating the opportunity in their networks
- Support to shape the learning and insights through sharing what would be most useful for them

7. Activity timeline

Timeline	Activities
Sept – Dec 2024	Appoint Co-Creation Group; Finalise fund design; build application pack
Jan – May 2025	Launch 6-week Open Call; Review and shortlist applications; select finalists; Due diligence; disburse funds
June 25 – May 27	Two-year implementation
June 27 onwards	Initiative ends; Ongoing evaluation and sharing of insights

8. Expected results

The initiative intends to equip leaders with the knowledge and skills necessary for effective contributions to systems change. The project also seeks to cultivate a diverse leadership pipeline, reflecting principles of inclusivity and equity.

By facilitating broader impact and learning, Shaping the Future Leadership Initiative aspires to generate insights and connections that extend beyond its immediate parameters, influencing not only participating organisations and networks but also funders and the wider field. Additionally, the project aims to encourage participatory grant-making, modelling and instilling confidence in more collaborative and inclusive decision-making processes.

Furthermore, it endeavours to strengthen well-being and sustainability practices, contributing to the overall health and longevity of entities within the sector.

Shaping the Future Leadership Initiative aspires to document best practices, compiling case studies and success stories for knowledge-sharing within the sector. Ultimately, the project seeks to cultivate a more resilient and interconnected refugee and migration sector, better equipped to navigate challenges and drive meaningful change.

9. Learning and insight

Learning, sharing insights, and monitoring the progress of the Shaping the Future leadership initiative are crucial for addressing key issues in leadership within the sector.

Learning and evaluation is being provided by a partnership, combining the unique strengths of [Curiosity Society](#) and [The 3 Hijabis](#).

Our approach to learning is divided into two main areas:

- Fund learning and insight
- Grant partners learning

For Fund Learning and Insight, the Co-Creation group will collaborate with a consultant to ensure that impact and learning are central to the programme. We aim to understand more about participatory grant making, focusing on how it can shift funder power to impacted communities. We will also assess the fund's impact on leadership in the sector by gathering feedback from grant partners about their experiences.

For grant-partner learning, we believe it is valuable to create opportunities for grant partners to learn from each other. Building on our recent efforts- through the project- Equity Catalysts, to develop a Community of Practice on leadership, we aim to facilitate a network where grant partners can share and mentor each other. This will foster a collaborative leadership approach that is essential for the sector's sustainability.

10. Funders

The funding target for the Shaping the Future pooled fund has been reached. The trusts and foundations that are contributing to the Shaping the Future initiative include the following (with others that will be announced soon): A B Charitable Trust, Barrow Cadbury Trust, Esmée Fairbairn Foundation, The Refugee Council, This Day Foundation and Unbound Philanthropy. Of the total funding, around 90% of the budget will be distributed as grants, with the rest used towards supporting participation of the Co-Creation Group, learning and evaluation, and insight generation.

11. Connected projects and partnerships

MEX also worked with Freedom from Torture, Refugee Action and Refugee Council to organise a conference in April 2024 on Lived Experience Leadership. A report was published in June 2024 which you can read here: [Report: Reclaiming lived experience leadership](#)

The '[Equity Catalysts](#)' community of practice has engaged 55 people from across the sector, who will in some way be involved in shaping this initiative. We had a final conference for this community of practice in June 2024 in London.

Alongside our leadership development work, MEX has also been involved in a Co-Creation Group, led by Refugee Action's Good Practice and Partnerships team, on wellbeing in the refugee and migration sector. It involves other organisations NACCOM, Justice Together Initiative, AVID and GMIAU, among others. Insights from a [report](#) (March 2023) align with those from our scoping on leadership, showing that wellbeing issues and burnout are becoming an increasingly large concern for people in the sector. MEX will continue engaging in the working group to continue ensuring that the two interconnected pieces of work complement each other and share learning.

References

Some reading related to our past work on leadership development

Executive Summary, '[A Snapshot of leadership development in the UK refugee and migration sector](#)', December 2022

Blog '[Leadership development for social change: key themes from our event](#)', May 2023