

Annex C : Analysis of the Learning programme

Key questions

1. Was the training delivered efficiently and effectively
2. Did the programme match the key priorities in the 2009 or 2011 training needs analysis
3. Did the feedback show that Funding Advisors had developed skills and knowledge
4. Did the training meeting the first of the four target key outcomes

[Establish an annual learning programme for 40 Funding Advisors (FAs) in year 1 which (i) responds to their needs. (ii) Participation to grow 20% each year. (iii) Monitored by training attended, qualifications gained, knowledge acquired and (iv) revised in response to FA feedback.]

(i) Was the training delivered efficiently and effectively?

The training and events scored consistently well for practical delivery and support arrangements and the larger events were particularly useful in exposing funding advisors to a wide range of ideas and connections in a time efficient manner. There was also feedback suggesting that the core training programme might have been delivered in a shorter time.

(ii) Did the programme match the key priorities in the 2009 and 2011 training needs analysis

The key priorities in the 2009 and 2011 training needs analysis were extremely broad in terms of subject areas and skills. 111 people responded to the 2011 training needs analysis which identified a set of skills that funding advisors needed with understanding funding criteria and diagnosing groups needs identified as absolutely essential and 6 skills – analysis of project outcomes, research funding streams, partnership working, project management, trends analysis and feedback skills. Highly desirable skills included marketing, business strategy, events organisation, databases, fundraising, working with diverse communities. Respondents had already received training in a number of those skill areas and the report suggested five priority areas

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| Understanding trends in fundraising | Business management | Project management |
| Analysis of project outcomes | Fundraising/on-line resources and marketing | |

The report then analysed the top 5 priorities for introductory training, advanced training and accredited training. In the 2011 training needs analysis, 73 people responded. The top priorities reflected trends appearing across the UK including tender readiness support, personalisation, accessing support from the business community, European funding, trading activities and business planning/loan finance.

The learning programme addressed the majority of these areas either through the training courses or through the larger events.

The core training programme delivered 8 courses. How To Excel in Funding Advice was delivered 5 times and covered : diagnosing groups’ needs, the income spectrum & the issues raised by each category, communication barriers between funders, advisers and applicants, partnership working & conflicts of interest, future models of funding advice, funding trends (including contracts), Evaluating funding advice and giving constructive feedback on funding bids. There was also training for people new to funding advice - both advisors and development workers with funding as part of their role which covered funding strategies; different income sources; the range of support and resources available to groups; funding bids and funders’ monitoring and evaluation requirements.

Other events with workshops covered all the other main areas identified in the needs analysis (including social enterprise, personalization, European funding etc.)

However, whilst the programme covered the key themes identified by the needs analysis, it did not follow through on the idea in the initial needs assessment which identified three categories of training and suggested targeting particular groups for each training and event. As a result, some of the feedback indicated that for experienced funding advisors events were too geared to the needs of development workers and those with a partial role around funding advice and vice versa.

The initial needs analysis also indicated a need for business planning, project management and outcomes but although those elements were integrated into other larger events rather they were not addressed as part of the core training programme.

(iii) Did the feedback show that Funding Advisors had developed skills and knowledge?

The feedback evidence suggests strongly that those who attended developed skills and knowledge. (Annex main table for full analysis). The smaller more intensive courses enabled participants to develop new skills, whereas the larger events with short workshops were better at enabling people to build confidence and knowledge and develop networks.

(iv) Did the training meet the first of the four target key outcomes

This target was met in part. An annual learning programme was developed and there was a comprehensive needs analysis which underpinned the training. However although the larger events were very popular, the bespoke training attracted only 26 participants (the target was 40). The target was to also to grow participation by 20% each year. The figures suggest that target growth rates were met in the first two years for training and events but there was a drop in year 3:

| | Training Attendance | Event Attendance |
|------|---------------------|------------------|
| 2010 | 26 | 229 |
| 2011 | 35 (+35%) | 211 (-7%) |
| 2012 | 16 (-54%) | 115 (-45%) |

The training was to be monitored by training attended, qualifications gained, knowledge acquired and revised in response to FA feedback. This objective was achieved through comprehensive feedback on each training course and event. However the approach to gathering feedback was not consistent and although some evaluations enable clear outcomes to be identified, in other cases it is not possible.

(v) Who attended the training?

- Most events attracted a range of CVS and other infrastructure-type organisations from across the region so met the target audience
- Events usually also attracted relatively high numbers of participants from local councils
- The sign in sheets did not ask people to identify their role so it is not clear how many participants were funding advisors
- A real theme emerged of the events bringing together statutory, third sector and private sector individuals (business link attended a number of events).

| Course | Participants (<i>numbers are approximate as not all organisations are easily categorised</i>) |
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| European funding 2012 45 participants | A small number of CVSs (3/4) and an RCC (Excludes 1EM) 9 statutory partners including local councils, fire service and DCLG National and regional charities (e.g. Princes trust) Local front line groups Consultants |
| Funding for real 63 participants | 17 CVS participants (excluding 1EM) – some sent more than person 11 statutory partners (mainly councils) 3 people from the Big Lottery A mix of consultants, front line groups and others whose status is unclear |
| Responding to change Loughborough 76 participants | 17 people from organisations that are effectively local infrastructure providers (CVSs, volunteer centres and RCC) 18 statutory partners (mainly councils) 6 people from Big Lottery Front line groups – both national (AgeUK etc) and local VCS infrastructure came from Leics, Nottingham, Northamptonshire, High Peaks, Lincolnshire, Bolsover, S Lincs, Gedling, Derby. |
| Review, Reaction, Action 81 participants | 22 people from CVSs, volunteer centres and other ‘infrastructure’ organisations. 13 statutory partners 4 Big Lottery and 1 Heritage Lottery 10 other participants who fall into the category of funders (children in need, community foundation, banks, social finance) Others include front line organisations including larger charities such as Groundworks, Headway, Mind and Age UK as well as smaller organisations |
| Sustaining and Transforming 37 participants | 9 CVS/infrastructure people 5 public sector participants 6 people from 1EM 5 people from Big Lottery 5 participants who were funders or private sector businesses A mix of front line groups (mainly larger groups like Headway) |

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| | 52 people on the sign in sheet – 8 no shows |
| Stepping Up to Enterprise 111 participants | <p>20 CVS/infrastructure people 24 public sector partners 5 funders (including Big and Santander) 4 from business link and business in the community Front line charities and a real mixed bag of participants including schools, museums, private sector organisations)</p> <p>134 on the sign in sheet but not clear how many were speakers or workshop facilitators.</p> <p>19 no shows</p> |
| The Big Sell 76 participants | <p>10 participants from a CVS or infrastructure organisation (at last someone from Rutland!)</p> <p>2 statutory partners</p> <p>A very diverse group of front line organisations and a very different set of participants compared to previous events. Lots more organisations working with ethnic minorities, people with disabilities, housing (including tenants associations), carers, victim support, elders, women’s groups)</p> <p>5 people from Nottingham Trent university (not clear if participating or presenting)</p> <p>Strong Nottingham contingent</p> <p>According to the sign in sheet 23 people failed to show up</p> |



SUMMARY OF TRAINING AND EVENTS

| 2010 | 2011 | 2012 |
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| <p>How to Excel in Funding (Northants)</p> <p>14 participants (13 responses). Very good feedback with 76% saying they would put new ideas and suggestions into practice; 30% would put new skills into practice but only 1 planned to change the way funding advice was delivered. Overall feedback was really positive about the value of the day.</p> <p>Respondents were ambivalent when asked if the funding training would make a difference to the sustainability of the groups they worked with particularly because of the challenging funding climate. 25% of respondents suggested that the training had achieved outcomes around building their own confidence but two people thought the training would not make much difference to their clients and one person clearly felt that the training was more suited to development workers than to specialist funding advisors.</p> | <p>Legal Issues Workshop – Lincoln</p> <p>14 participants and 14 responses. 70% were very satisfied and 78% planned to put the learning into practice and 57% felt they gained new skills that they would put into practice.</p> <p>Direct feedback suggested that participants felt they were more confident about their advice and its quality. Overall feedback was that this was a really great workshop.</p> | <p>How to excel in funding advice, Leicester</p> <p>5 participants [one single evaluation]</p> <p>How to excel in funding advice - Summary Report</p> <p>The funding advice analysis contained 32 responses. 45% were very satisfied with the training. 78% thought they would put new ideas and knowledge into practice and 46% would put new skills into practice. Most participants thought the training would make a difference to the sustainability of the groups they worked with.</p> <p>The comments left, suggest strongly that participants gained improved knowledge and skills and would be more confident in offering advice to groups. Skills gained included the confidence to give more in-depth and tailored advice and to help groups look at longer term sustainability.</p> <p>The question about future training needs elicited a number of specific responses [project management, funding courses, bid writing courses, facilitation skills and general governance suggesting that a number of participants benefitted by gaining a greater understanding of their own gaps in knowledge. A quote that summed up what a lot of people said was 'An enjoyable and interactive learning experience that enabled me to reflect on my job and think about how I could improve'</p> |
| <p>How to Excel in Funding Advice (Nottingham)</p> <p>12 participants. Very good feedback from the training with 73% of respondents saying they would put ideas and suggestions into practice and 45% would put new skills into practice. 27% said they would deliver funding advice differently. Feedback suggested that the training achieved clear outcomes around improving confidence and skills for participants and strengthened their ability to give good funding advice. One respondent said that they had concentrated on funding advice but would now also look at general governance and capacity building (which is a strong positive indicator for better funding</p> | <p>How to excel in funding advice Derby</p> <p>16 participants [one single evaluation – see 2012]</p> <p>How to excel in funding advice Lincoln</p> <p>5 participants [one single evaluation – see 2012]</p> | <p>Social Finance Fair</p> <p>No evaluation information provided</p> |



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| <p>advice).</p> <p>On efficiency and value for money some comments suggested that it could be delivered in shorter time (1.5 days) and distance was an issue for participants.</p> | | |
| <p>Improving Access to Funding Jan 2010</p> <p>There were 72 participants in this regional networking event. 44 gave feedback and were a mix of infrastructure, local authority, funders and other organisations. Feedback was positive – 45% of respondents found the event very useful (27% of total participants) and 61% thought the event had completely met or exceeded expectations (37% of total).</p> | <p>Stepping Up to Enterprise (partnership event with SUTE)</p> <p>111 participants with 52 feedback forms. A wide range of workshops including advice on trading, financial awareness and investment readiness, social networking and enterprising culture change. A standard reporting form was used.</p> <p>Overall satisfaction ratings were high with average scores of 4.2 for the day and 4.0 for the workshops however this was partly because the legal issues and trading and investment readiness workshops were particularly highly rated. There were 8 workshops altogether and some expressed frustration at only being able to attend 2.</p> <p>Feedback comments suggest that outcomes for participants included increased knowledge, really useful toolkits and resources. A number (less than 5) said they would have wanted workshops to be more interactive and less being talked at.</p> | <p>Funding Skills for New Advisors, Leicester</p> <p>4 participants. All four said they gained new ideas a knowledge that they would put into practice. 3 out of four also said they gained new skills. All the evaluation comments included reference to increased confidence in the advice given.</p> <p>Advising groups on funding issues (on line)</p> <p>7 participants no evaluation information provided</p> |
| <p>Responding to Change Jul 2010</p> <p>This event had 76 participants and including a range of themes including personalisation, social media, new forms of funding (forget the grant). This event was less highly rated than the previous one with workshops scoring an average of 3.8 out of 5 and the day overall 3.9 – but still good scores. The social media workshop was rated the highest.</p> <p>Comments on the content suggested that information had been gained but relatively few thought they had acquired new skills. The outcome of the event was a strong motivation for funding advisors, an increased awareness of the changing political context, new challenges such as personalisation and commissioning and a strong positive message around the benefits of networking.</p> | <p>Funding For Real</p> <p>There were 63 participants and 46 evaluation forms. The standard evaluation was used. The event launched funding monitor and offered 6 workshops : gift economy, financial sustainability, closure issues, sustainable fundraising strategies, legacies and major donors, equality, diversity and funding advice. The overall event rated an average 4.0 with most workshops scoring a minimum of 4 but one (funding and figures) getting poor feedback because some participants felt it was telling them how to do their day jobs and was not innovative or well informed. One particular comment seemed to encapsulate a number of views</p> <p>'I didn't feel I learnt new skills and knowledge from the workshops as I already cover these areas in my work. But what's useful is talking to others in similar roles, finding we have similar challenges and concerns. Nice to have some good debate about where the world is going - would like more</p> | <p>European Funding</p> <p>45 participants with a format of presentations and workshops. This event used a different evaluation form with some similarities but some altered questions. Workshops included State aid and public procurement, Practical advice on the ERDF application process, Using economics to support an application, variations in match funding arrangements.</p> <p>17 feedback forms were gathered. 75% rated the event satisfied or very satisfied. 59% would follow up new contacts, 47% would put new ideas into practice but only 1 person said they gained new skills they would put into practice.</p> <p>The numbers feeding back on the workshops were relatively small (7/8/9) but overall people tended to rate between 3 and 5. The practical advice session was the most highly rated.</p> <p>In terms of outcomes, people felt they were better</p> |



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| | <p>debate on how we can challenge government/LA policies rather than go along with every new idea'</p> | <p>informed about European funding and could give better advice as a result. A number commented that they would have liked to attend the workshops they could not fit in during the day. Although not a large number, there were comments about the day being more interactive and more opportunities for discussion and less time being talked at but overall participants who gave feedback found the event useful and welcomed the networking.</p> |
| <p>Review, Reaction, Action</p> <p>This event had 81 participants and focussed on how the sector could respond to funding cuts and manage change. Workshops included fundraising, collaboration, enterprise and commissioning. The evaluation form was the same as the previous event. 40 people filled in the comment sheets.</p> <p>Overall the programme rated well with an average overall rating of 4.1. The workshops were more variable with average scores from 3.4-4/2 but that is still a high rating.</p> <p>In terms of specific outcomes although a few participants felt that they had increasing funding advice skills as a result of the event, the most highlighted access to new information and networking as the main benefits including a better understanding of collaboration and partnerships.</p> <p>In terms of practical feedback there were only a few comments which suggested that longer workshops with more time for engagement would have been better suggesting that the event was more an information download than an interactive session</p> | <p>Sustaining and Transforming (Derby)</p> <p>37 participants and 20 evaluations. A mix of working groups and three workshops : trends in grant funding, accessing support from the business community, developing a business plan that sells. Overall the event was rated 3.8 with workshops rating between 3.2 and 4.0. The feedback was particularly thin for this event and outcomes for the participants are not so clear although networking and information were positive recorded outcomes.</p> | <p>The Big Sell</p> <p>76 participants booked and 33 filled out the evaluation. The event offered a range of presentations and workshops on a very varied range of subjects including partnerships and consortia, product marketing, personalisation, pricing a service, social investment, improving internal markets, e-commerce, trading models and social media.</p> <p>A new evaluation form was used which was not entirely consistent with the others. 69% were satisfied or very satisfied. 60% would follow up new contacts, 36% would put new ideas into practice, 9% would put new skills into practice. The social investment workshop was the most highly rated and a number of participants asked for longer sessions on this subject. The price is right workshop was also well rated. The workshops were also felt to be rushed but there were some really positive comments about the value of the day and the focus on new ideas and challenges.</p> |