
Learning Needs Analysis for Funding Advice 2011

Following on from the first Learning Needs Analysis for Funding Advice survey in 2009 by EMFAN and Regeneration East Midlands, EMFAN and One East Midlands carried out a second survey during autumn 2011 of the learning needs of funding advice workers in the region.

Out of a circulation of nearly 300, 73 people responded to the 2011 survey providing a rich and valuable source of information about who funding advisors are and what their needs are in terms of knowledge, information, skills, and training provision. This document summarises our findings.

Thank you to all those who responded to the survey and who forwarded the survey to colleagues.

If you would like to make further comments on learning needs around funding advice, or to suggest appropriate learning activities please email info@emfan.org.uk.

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Summary

Aims of the report

With this report we aim to support the personal development of paid workers and volunteers who provide funding advice services for voluntary and community groups. By identifying key skills and knowledge and trends in the sector we hope to help individuals and their managers to make choices about training and other learning activities.

Secondly, the report will guide the continuation of a programme of learning activities delivered or promoted through East Midlands Funding Advice Network. We have identified core subjects for EMFAN's own funding advice training as well as additional learning needs that we hope to meet through events and discussions and through promoting training from other providers.

Thirdly, the report will compare the results of the 2011 survey with the original survey in 2009, showing how the learning needs of those providing funding advice services to the sector have changed during the past two years and how the ongoing work of EMFAN needs to reflect this.

Key findings

- 36% of respondents work across the region and 55% work within the VCS.
- Only 3% of respondents work full time in funding advice, with the majority (55%), only providing funding advice as part of their role, with 43% spending less than 1 day per week on funding advice.
- A third of respondents provide funding support across a range of small voluntary and community groups, service delivery organisations, charities and social enterprises.
- 44% of respondents possessed a funding advice qualification, including over a third of respondents possessed a Level 2 OCN certificate in advising groups on funding advice.
- Over half of respondents provided guidance on funding bids, supported Big Lottery Fund applications and applications to charitable trusts, provided signposting and facilitated partnership working, and diagnosed and provided feedback on group need.
- Over half of respondents also thought that guidance with funding advice would remain the most important service they provide in the future.
- Over a third of respondents wanted training in accessing support from the business community, developing trading activities and tender readiness support.
- Over 60% of respondents would favour funding advice training that increased their practical skills and knowledge over training that led to a recognised qualification.
- Over two thirds of respondents would be willing to pay up to £50 for a days funding advice training, with half of these willing to spend up to £100.
- 82% of respondents have benefited from the EMFAN email bulletins, 64% from its regional events and 53% from its support to county networks.

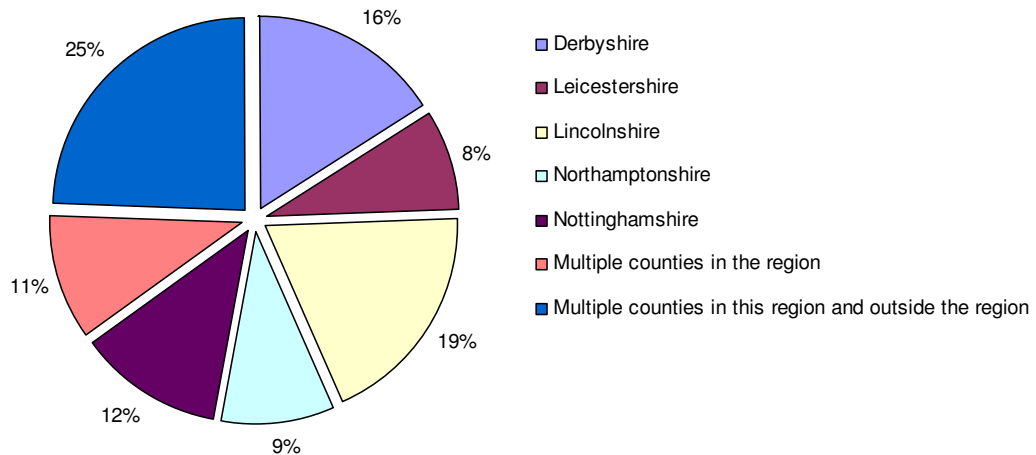
Next steps

- The EMFAN project will develop a training programme for 2012/13 in line with the recommendations in this report and work with other infrastructure projects to identify a range of alternative training opportunities for funding advice workers.
- The detailed recommendations of this report will be integrated within EMFAN's project plans.
- The project will share this analysis with EMFAN members, stakeholders and training providers with an interest in funding advice training and related areas.
- The EMFAN project will continue to research and respond to the learning needs of funding advice workers over the course of the project (until 2013).

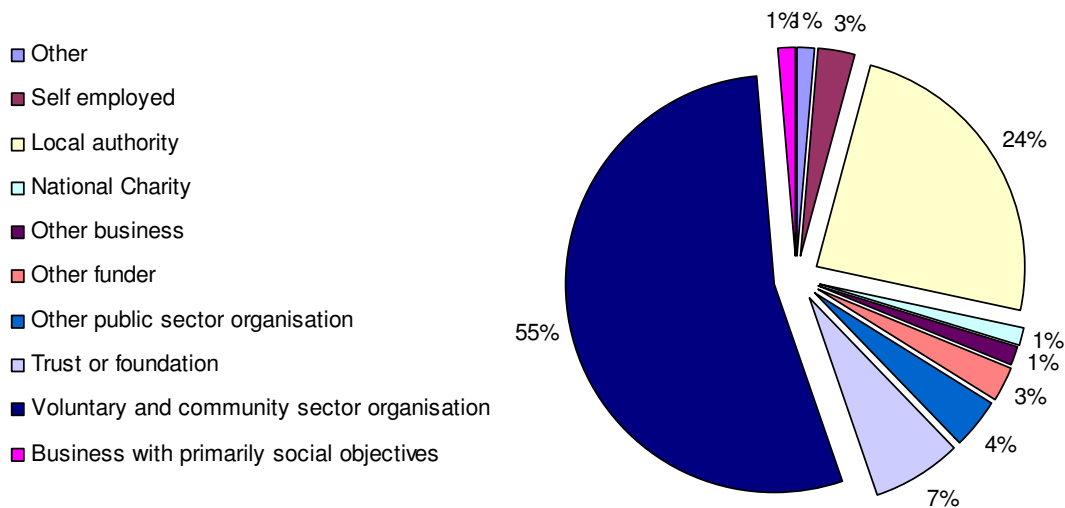
Section 1: Introduction

In order to understand their training needs, we wanted to understand the range of organisations and individuals delivering funding advice in the region.

36% of respondents to the survey provided funding support throughout the region, and in 11% of cases beyond. For those who were county specific, the highest number were located in Lincolnshire (19%) and Derbyshire (16%) with the lowest numbers in Leicestershire (8%) and Northamptonshire (9%). None of the respondents worked solely in the smallest county of the region, Rutland.

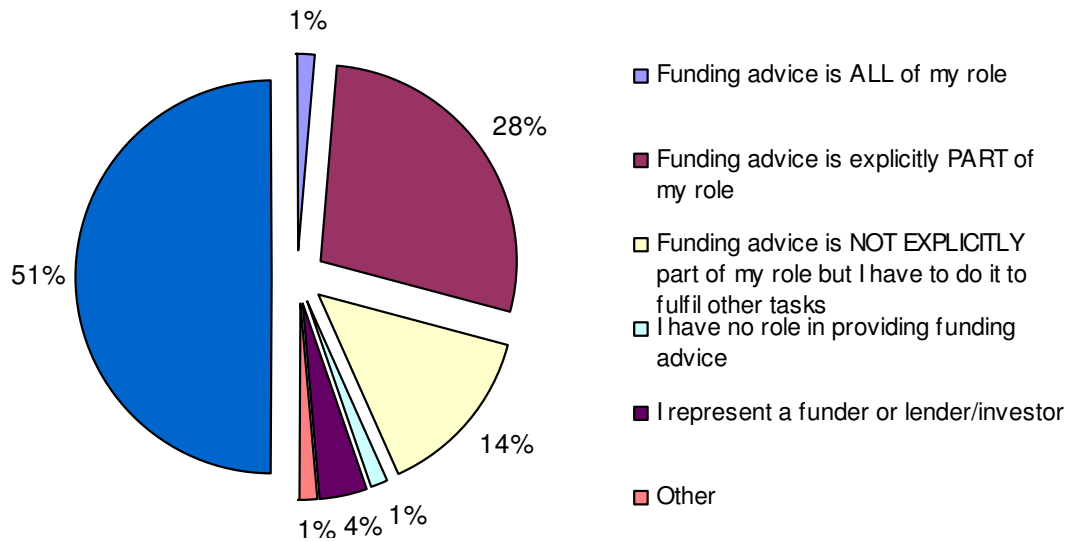


When asked how to best describe the organisation that employed them or which engaged them as a volunteer delivering funding advice, 55% of respondents were located within the VCS, followed by 24% within local authorities. Only 1% were located within a national charity or a business with primarily social objectives.

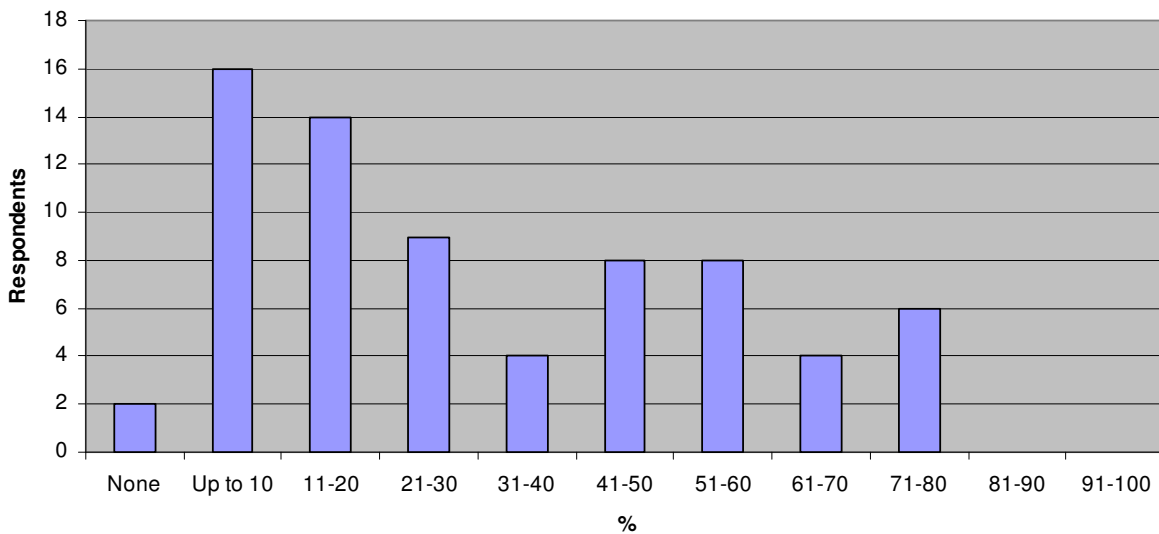


When asked how much of their role within their organisation was funding advice, only 3% worked full time in funding advice, with for the majority (55%) having it as only part

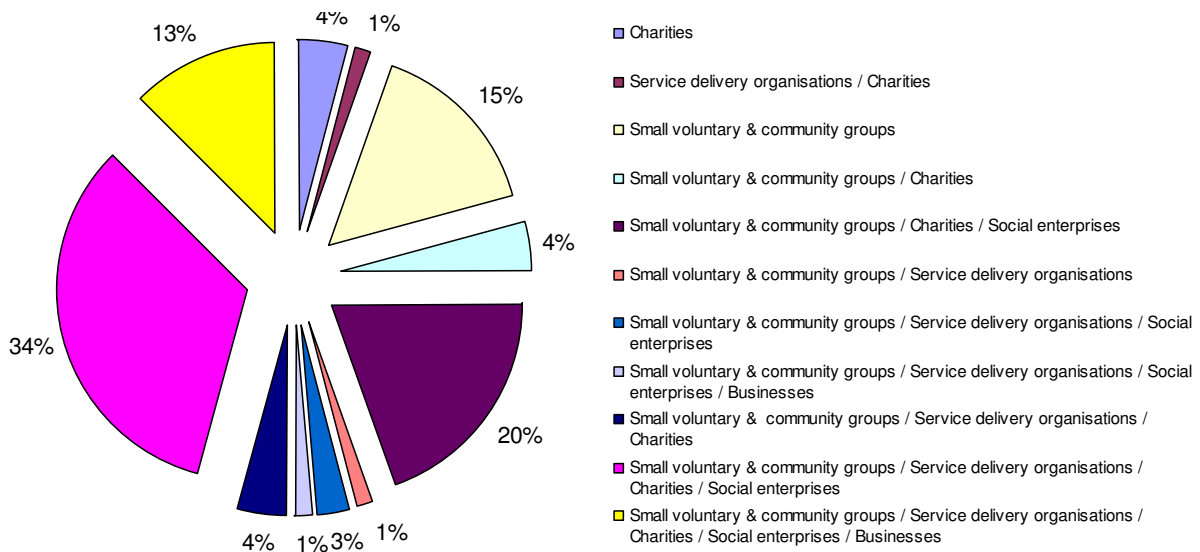
of their role, followed by 28% for whom it is not part of their role but who have to undertake funding advice work in order to fulfil other tasks.



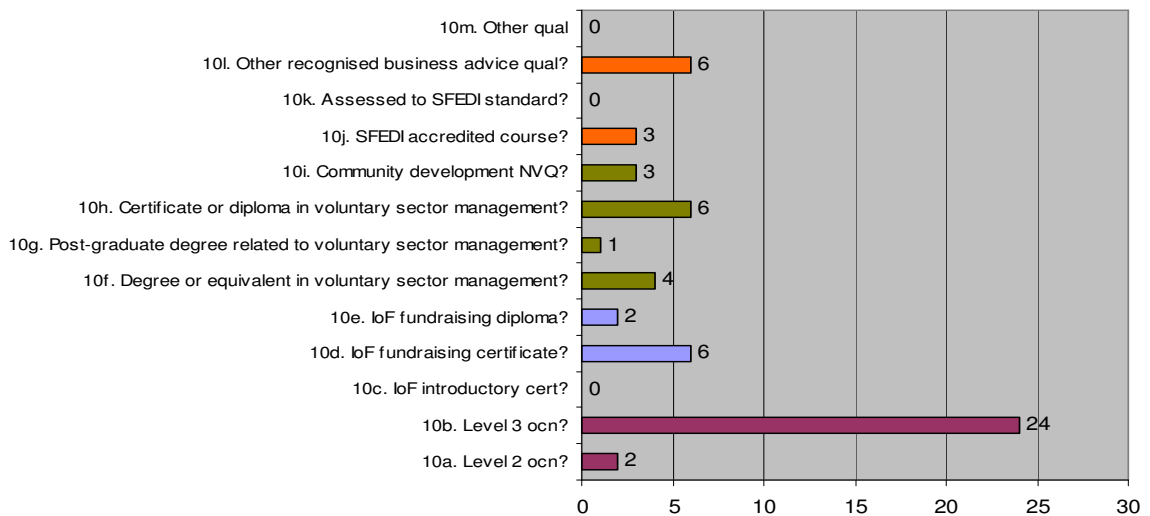
When asked, as a percentage of their work over the last year, what amount of time they had spent delivering funding advice, nearly a quarter of respondents spent less than 10% of their time delivering advice, rising to 43% spending less than 20% of their time delivering it. No respondents spent 100% of their time, with at the most 8% spending 71% to 80% of their time. This means that even those who consider themselves to work full-time in funding advice, spend at least 20% of the time not directly delivering funding advice.



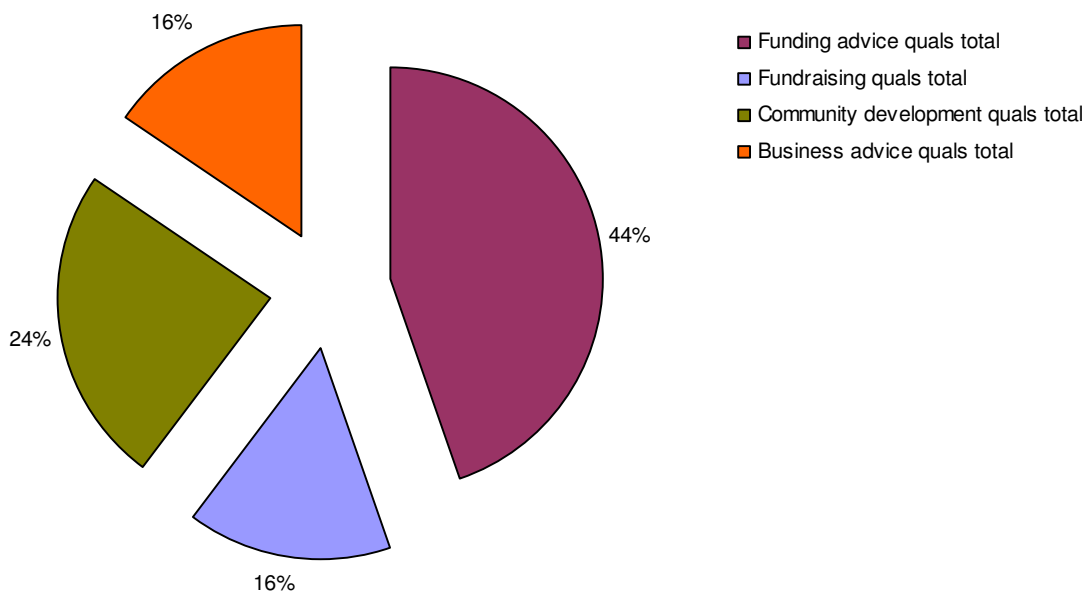
When asked what types of organisations they provided funding support to, a third of respondents provided support across a range of small voluntary and community groups, service delivery organisations, charities and social enterprises. Nearly a quarter (22%) of respondents only delivered to one specific type of group, with the majority of these (15%) delivering solely to small voluntary and community groups.



Respondents were then asked what qualifications they held in relation to their funding advice work. Over a third possessed a Level 3 OCN certificate in advising groups on funding advice. The figures then dropped for joint second place, with 8% each possessing an Institute of Fundraising Certificate in Fundraising, a certificate or diploma in voluntary sector management or similar, or another recognised business advice qualification. None of the respondents had completed an SFEDI accredited course or the Institute of Fundraising Introductory Certificate in Fundraising.



This meant that the majority of respondents (44%) possessed a funding advice qualification, followed by nearly a quarter (24%) possessing a community development related qualification. No survey respondents were qualified in both advice and fundraising.

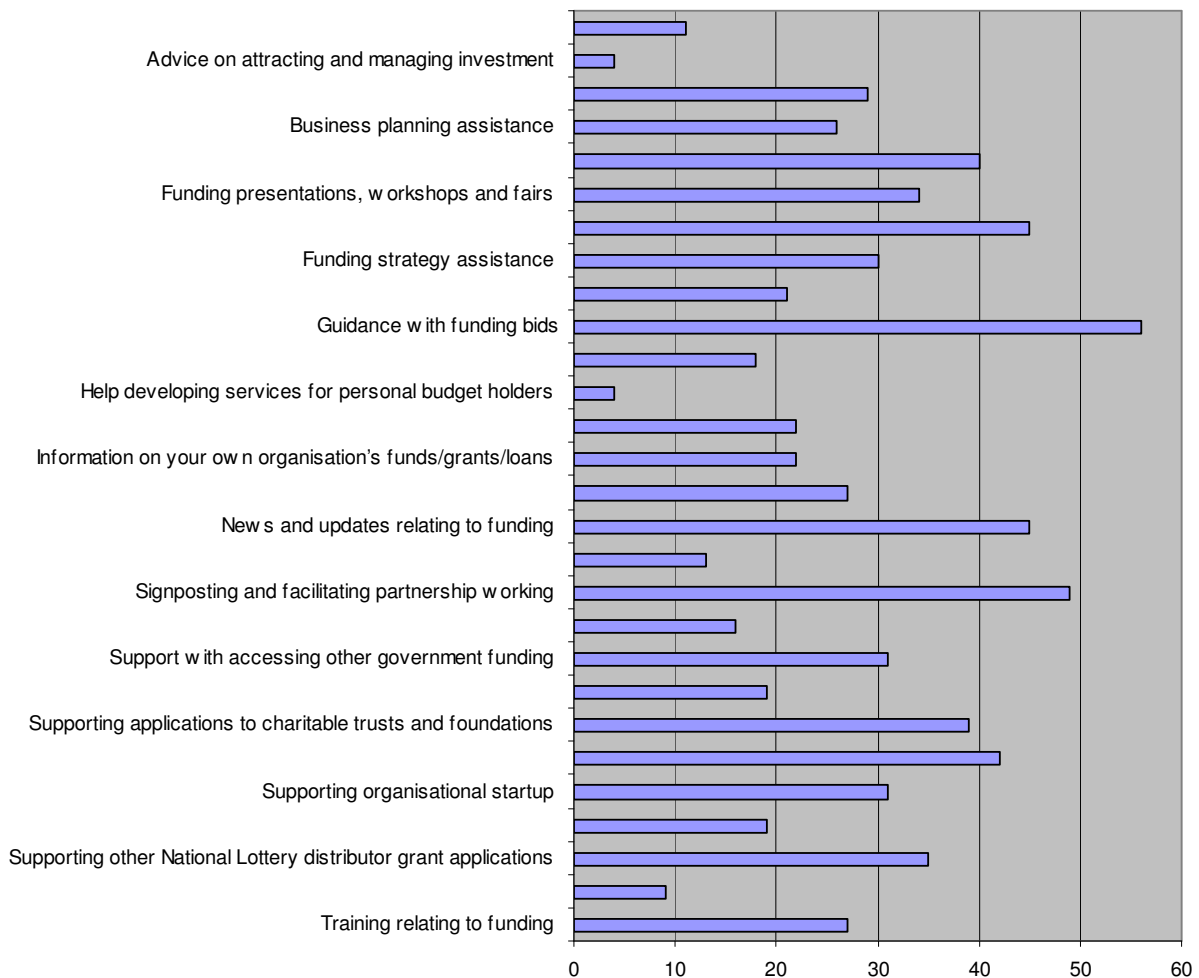


Section 2: Services, priorities & development needs

Answers in this section of the survey provided key information for understanding funding advice trends and future planning of EMFAN activities.

When asked which funding advice services they currently delivered, over 75% of respondents provided guidance on funding bids (76.71%) and over 50% supported Big Lottery Fund applications (57.53%) and applications to charitable trusts (53.42%); provided signposting and facilitated partnership working (67.12%); and diagnosed and provided feedback on group need (54.79%).

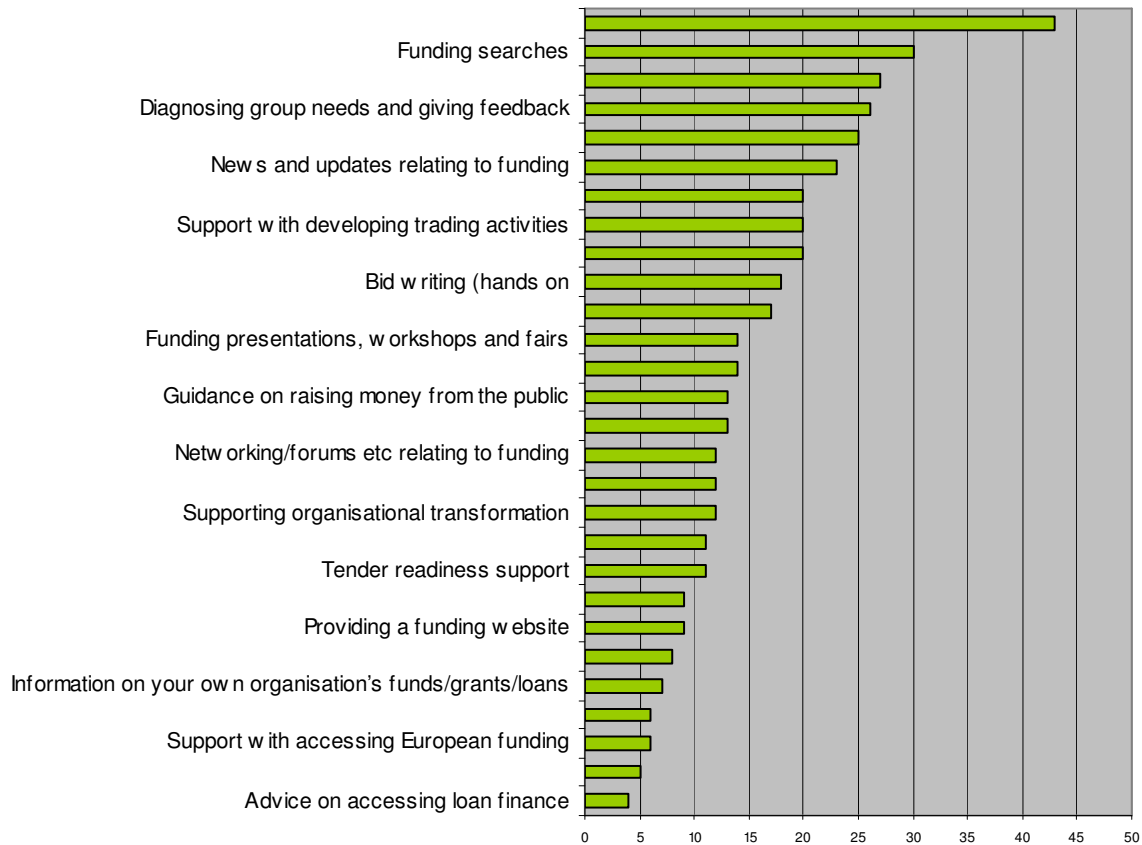
The funding advice services least delivered by respondents were tender readiness support (12.33%); advice on accessing loan finance (15.07%) and, in joint bottom place, less than 6% of respondents helped develop services for personal budget holders or provided advice on attracting and managing investment.



In order to help us understand respondents views of trends relating to funding advice and the support they needed to plan for these, they were next asked which funding advice services they thought were most important for groups in the future.

Over half of all respondents (58.9%) believed that guidance with funding advice would be the most important service in the future, followed by over a third agreeing that funding searches (41.1%); business planning assistance (37%); diagnosing and giving feedback on group needs (35.62%); and funding strategy assistance (34.25%) would be important.

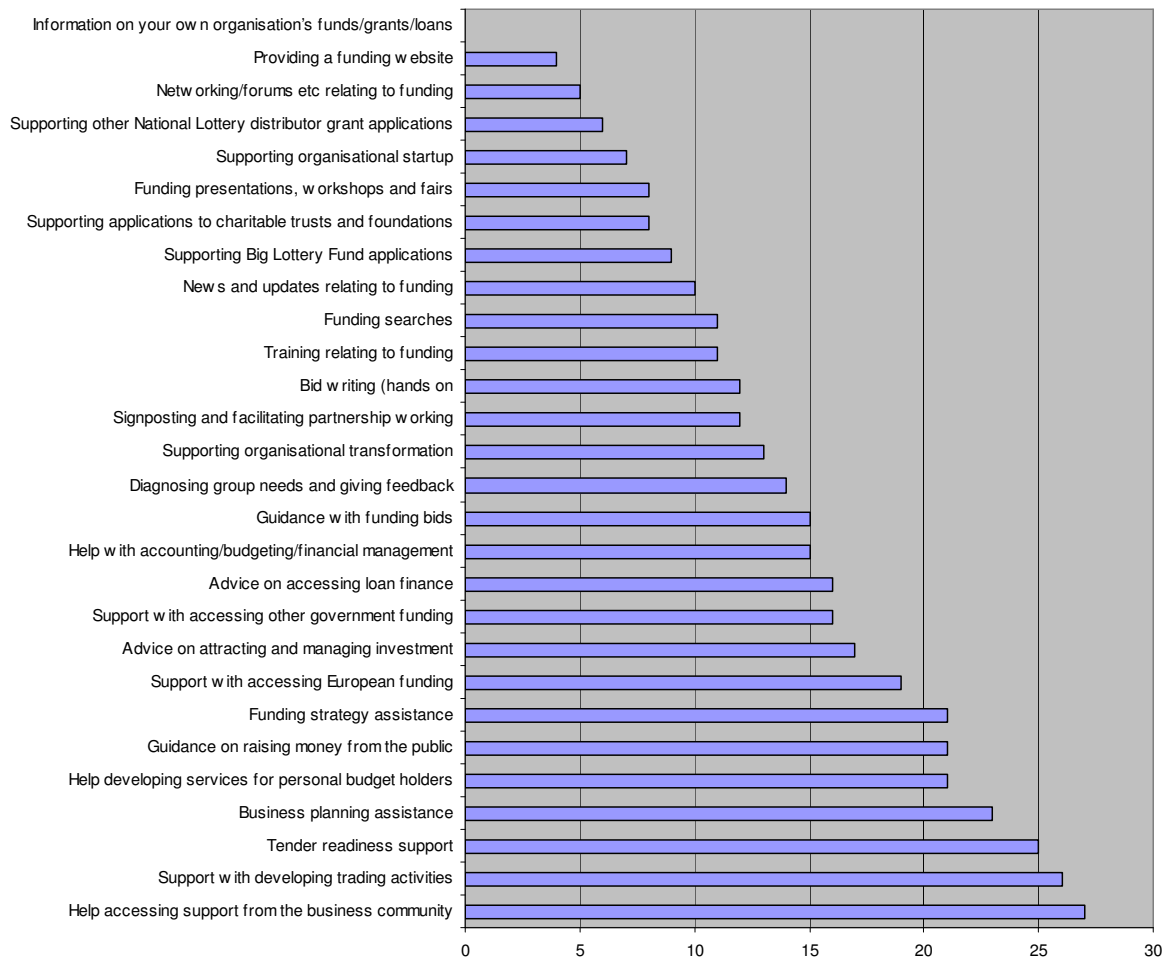
At the other end of the scale, less than 10% of respondents thought that advice on accessing loan finance (5.48%); support with accessing other government funding (6.84%) and European funding (8.21%); and help developing services for personal budget holders (8.21%) would be important.



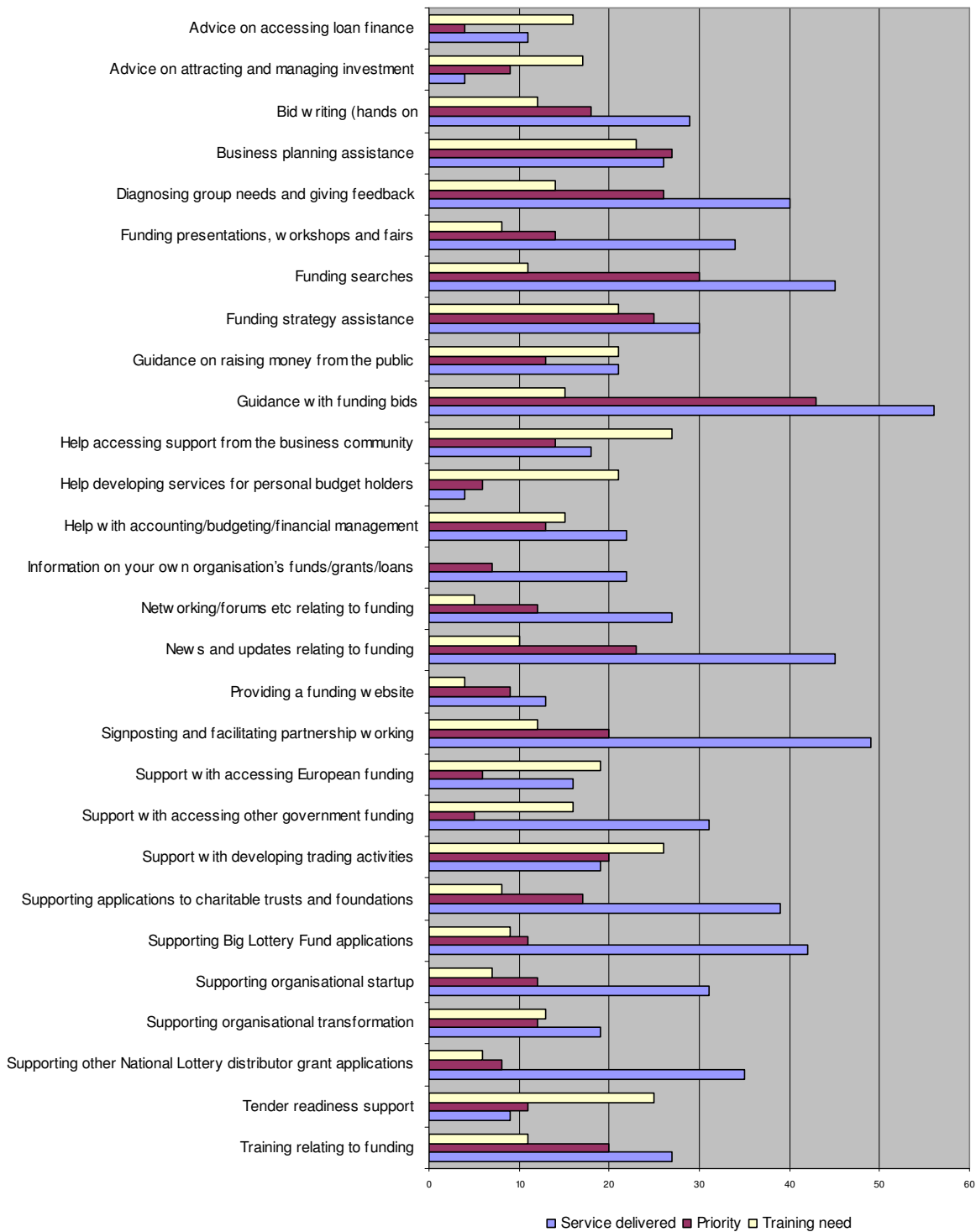
In order to influence the ongoing EMFAN learning programme, including training, events, workshops and information resources, respondents were next asked in which areas they would like to receive training.

Although responder training needs were spread across 27 areas with an average of 19.2% wanting to receive training in each area, over a third of respondents wanted training in accessing support from the business community (36.99%); developing trading activities (35.62%); and tender readiness support (34.25%).

At the other end of the scale, less than 10% of respondents wanted training in supporting organisation start-up (9.59%); supporting other National Lottery distributor grant applications (8.22%); networks and forums relating to funding (6.85%); and providing a funding website (5.48%).



The results of the services responders already supplied, what they considered would be most important for groups in the future and the areas in which they would like to receive training are merged in the graph overleaf. Combined, these results show that in most cases the service provided and the priorities do not match the training requirements or, similarly, the actual service delivered far outweighs how much it is prioritised and the training required for it.



Section 3: Training

In this section of the survey, respondents were able to share their views with EMFAN on the training they required. When asked what their most valued learning experiences were, relevant to funding advice, comments from respondents included:

- In house training and follow up led by expert fundraisers and trainers
- One-to-one mentoring and networking
- Preparing for and passing recognised qualifications
- Hands on experience working
- Learning from other peoples experiences
- Establishing long term contacts for effective information sharing
- Feedback from funders and groups worked with
- Inclusion in regional networks
- Translating theory and ideas into practice by working through practical examples.

When asked what was their most urgent need for funding advice training, comments from respondents included:

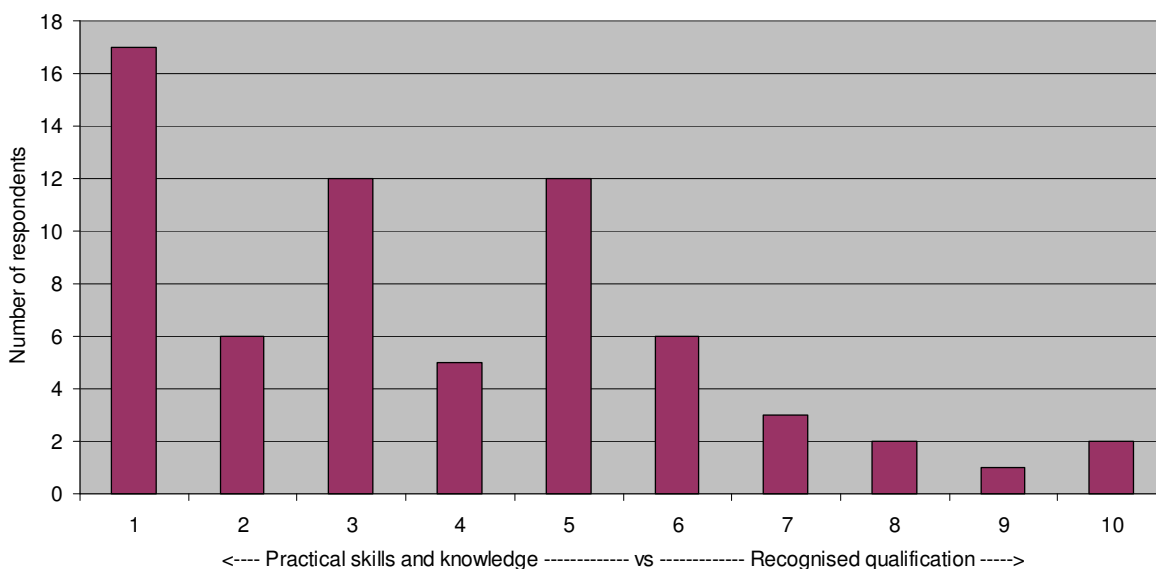
- Access to free or low price but effective funding search engines
- Successful bid writing
- Identifying most applicable funding sources
- Monitoring and recording of advice given
- Information on local funders and their success stories
- Raising confidence of groups to access alternative funding streams
- Accessing European funding programmes
- Assisting with applications, including how to make them stand out
- Accessing trusts and foundations
- Best way of delivering funding bids for individual organisations
- Policy and political background
- Organisation transformation to social enterprise
- Increased knowledge of funders and their criteria
- More network opportunities to develop knowledge across sector locally
- Using nationally gathered statistics as funding bid evidence
- Gaining funding advice qualification
- Advice on accessing personal budgets
- Information on contracts, tenders, trading, self sustainability and social enterprises
- Attracting ongoing donor funding through individuals and corporate sponsorship
- Measuring impact
- Advice on funding services for specific groups, e.g. LGBT and BME
- How to start charging for previously free services
- Information on financial management, budgets, cash-flow and accounts
- Email tips instead of training and networking when time is limited
- Engaging with the private sector
- Up-to-date understanding of changes in current funding climate.

Along their most urgent need, respondents were also asked what was their most important need for funding advice training, with comments including:

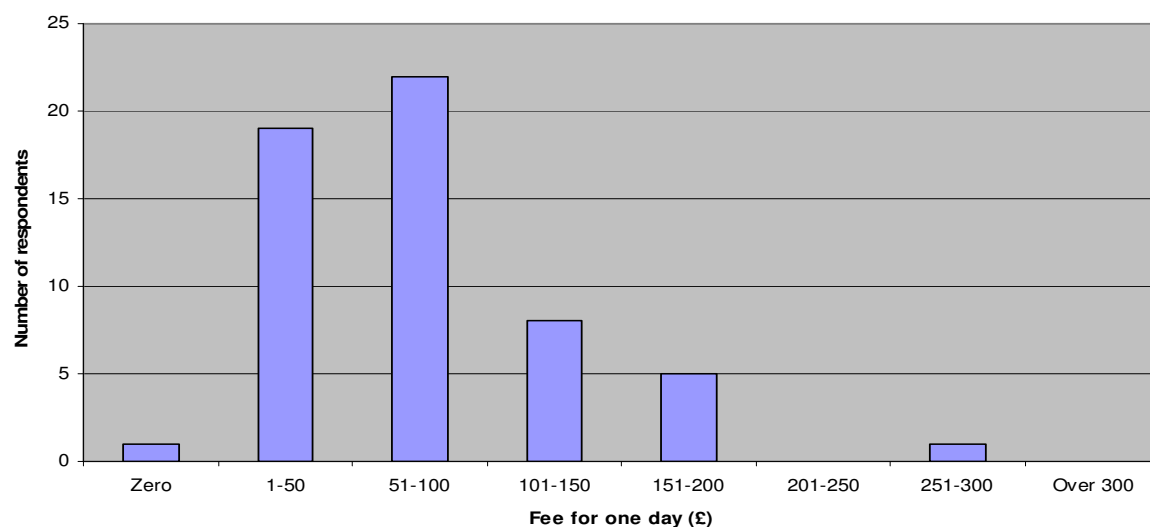
- Achieving a nationally recognised qualification
- Joint working with partners and engaging with the business sector
- Raising confidence of groups to apply for funding

- Training volunteers to provide funding advice
- A wider knowledge of funding options, including the social enterprise model, trading, loans, community shares, investments and personal budgets
- Accessing EU funding
- Improved guidance on assessing applications
- Identifying new funding streams, including their criteria, and writing appropriate bids for them
- Policy and political background
- A wider local knowledge of the sector through local contacts
- Promotion of services provided
- Internet applications
- Group development
- Conducting funding searches and developing funding strategies
- Refresher courses on specific areas, e.g. community fundraising, so up to speed
- How to use statistics effectively to argue cases for funding
- Attending EMFAN's 'How to Excel in Funding Advice' course.

When asked what they needed most from funding advice training, on a scale of 1 to 10, the overall majority of respondents needed practical skills and knowledge (60.6%) from funding advice training compared with only 21.2% wanting a recognised qualification. The remaining respondents were looking for a balance between the two.



In terms of what respondents would expect to pay for a days funding advice training, giving a realistic estimate taking into account their previous experiences and training budget, results ranging from nothing to one respondent willing to pay between £251 and £300. However over two thirds were willing to spend up to £50 (33.9%) or between £51 and £100 (39.3%).



Responders were then asked for their final thoughts on training needs and how EMFAN can help. As the political and economic climate has changed since late 2009 when the EMFAN project began supporting funding advice through training, events, workshops, networking and communications, we need to ensure that we remain relevant. A selection of the comments received are provided below:

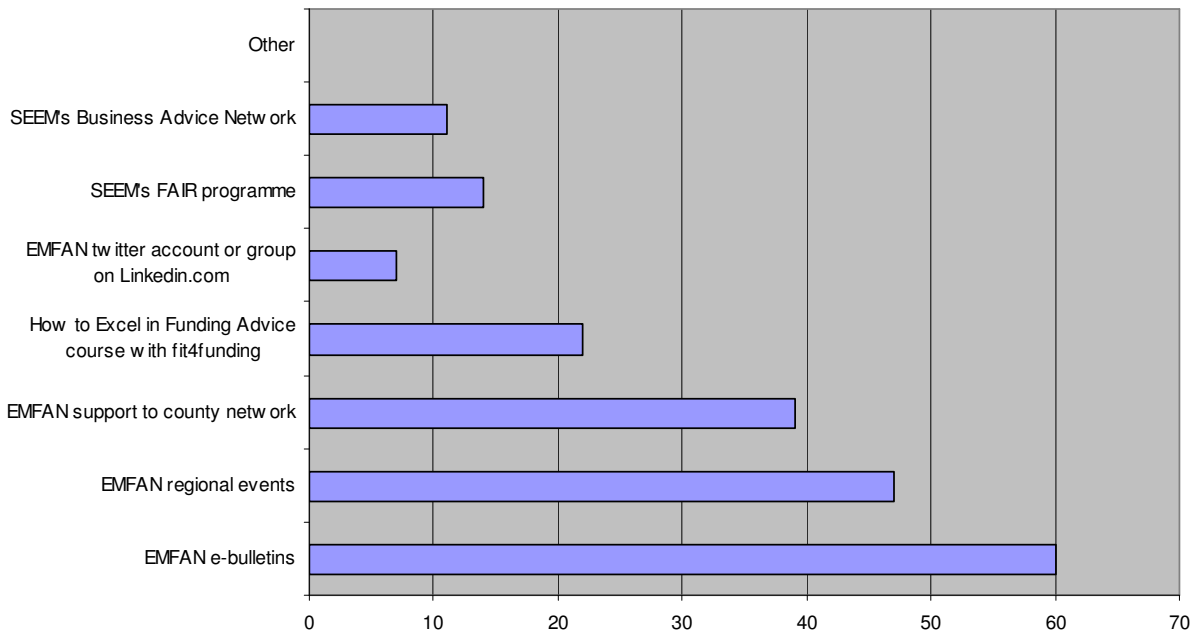
General training:

- More county-based training sessions as with the increasing cost of fuel and the recession, it is no longer realistic to travel just for a training session.
- Any attendance on future courses needs to represent good / excellent value for money particularly in terms of budgets.
- What I find most useful is passing on the lessons learnt by others who have applied for funding. What worked, what didn't work. Of course each group is different, but things like how to approach e.g. Reaching Communities outcomes etc, help to increase groups' chances of success.
- Actual nuts and bolts training like how to create financial spreads and accounts in a way that is acceptable to funders. I know what a social enterprise is, I don't want any more motivational stories about cafes or lists of the type of forms you can have, I need to know how you actually set up a company or a mutual - the legalities, the documents you will use, the implications of each one in detail and how you can tell if its right for you. We've had the theory now we need the practice.
- Choose topics relevant to experienced funding advisors: this could be people-skills enhancement, better knowledge of other areas of the funding spectrum (e.g. donor fundraising, charitable investments etc), or financial skills including financial management systems, forecasting, how to improve communications between finance manager / treasurer and staff / board.
- Convince us all that online networking is worth investing time in, and explore opportunities to deliver factual training by internet.
- Training shouldn't necessarily be the starting point. Putting us in touch with other organisations that are excellent at generating revenue for the VCS would be useful. We would be interested in visiting others in the EM or further afield to exchange ideas / learn from each other.
- I think the most urgent training needs are not so much on funding directly but on organisational transformation towards more entrepreneurial ways of securing income, plus consortia building and collaboration, maybe looking at more social enterprise training as well as the European funding streams.

EMFAN specific:

- Continue to offer training and advice and networking sessions. The more training, the more help I can give.
- Suggest the main priority for EMFAN is to ensure good support is in place for the VCS / CVSs. Helping develop the voluntary sector and build capacity will be key in the delivery of the Localism Agenda
- EMFAN could help to make sure there is easy access to online resources so that there is a library of training tools available for the future.
- Keep the momentum up on regular newsletters etc that are extremely user friendly particularly for those who have never applied for a grant before. These people still find the world of funding and its requirements a minefield.
- The monthly EMFAN newsletter is really beneficial for myself as it is often the only one quality newsletter where I can read about all the issues / opportunities relating to funding. I also share the newsletter with all the chief officers of local organisations, plus distribute it to the community and voluntary sector in the Borough - people find it of use. Please keep producing the newsletter, it would be a real loss if this was stopped.
- Produce and maintain a list of funders specific to East Midlands on a county by county basis. I believe Nottinghamshire have something along these lines. Similarly an easy reference to statistics to help evidence needs.
- Carry on. I think you are on track and open to change.
- Build a regional survey encouraging a group that has been successful with a funder to complete an evaluation of "how was it for you?" and give say Three Top Tips of why they thought they got funding. Have this available to Funding Advisors to network from.
- Keep on putting on relevant training and network events. Personally, I'm not into online forums and twittering so that's not an approach that works for me. I find e-bulletins useful, and found the FAIR training relevant and timely. The network event I went to was a good opportunity to talk to other funding advisers.
- To continue to provide high standard training sessions for funding advisers and to be a continued source of information regarding funding.

The final question of the summary aimed to discover how responders had benefited from a range of regional support for funding advice workers. Over 82% of responders believed they had benefited from the EMFAN email bulletins, closely followed by over half benefiting from the EMFAN regional events (64.4%) and EMFAN support to their county network (53.4%).



Section 4: Comparisons with 2009 survey

Although questions varied between the 2009 and 2011 surveys, some comparisons can be made between them, clearly showing how funding advice services have changed during the two year period.

- In 2009 less than 20% of respondents provided support throughout the region, compared to 2011 when this figure had increased to 36%.
- In both years, the majority of respondents were located within a VCS organisation (increasing from 43% to 55%), followed by local authorities (increasing from 22% to 24%).
- In 2011 the respondent priorities were accessing support from the business community, developing trading activities and tender readiness training. This has moved on from 2009, when the priorities were understanding trends in fundraising, business strategy and project management.
- The amount funding advisors are willing to pay for a full days training has fallen since 2009, from an average of £130 to a maximum of £170 in 2009 to only a third of respondents willing to pay up to £100 in 2011.
- In both surveys, the majority of respondents had benefits from the EMFAN e-bulletins, though both the EMFAN regional events and support to county networks has increased during the period.

Section 5: Recommendations

Initial recommendations for the EMFAN project that can be made off the back of the 2011 survey results include:

- Continue to offer training, advice and networking, focusing on accessing support in the business community, developing trading activities and tender readiness support.
- Provide access to a wide range of online training resources (see page 11-12) across a range of subjects.
- Continue to produce and circulate information online and via monthly e-bulletins.
- Continue to support county funding advice networks.

Section 6: Next steps

- The EMFAN project will continue its training programme in 2012/13 in line with the recommendations in this report and work with other infrastructure projects to identify a range of alternative training opportunities for funding advice workers.
- The detailed recommendations of this report will be integrated with EMFAN's project plans.
- The project will share this analysis with the Network members, stakeholders including East Midlands Funding Forum and with training providers with an interest in funding advice training and related areas.
- The EMFAN project will continue to research and respond to the learning needs of funding advice workers over the course of the project (until 2013).

Section 7: Additional information

To save paper we have opted not to include appendices, which would have increased the size of the document. Additional information from the survey, available on request from info@emfan.org.uk, includes:

- A copy of the survey questions
- A breakdown of the statistical data by county
- A breakdown of the statistical data by sector
- A full list of comments
- The report on the original 2009 survey

Section 8: Contact details

Please direct your feedback, questions or comments to info@emfan.org.uk or telephone One East Midlands on 0115 934 8471.



The EMFAN project is supported by Big Lottery Fund

