

Sustaining & Transforming – The Future of Funding Advice Event Report

Wednesday 7 December 2011

This East Midlands Funding Advice Network (EMFAN) event, which took place at Déda in Derby, aimed to help delegates sustain the development of their funding advice work in a period when funding and infrastructure are in transformation.

The event was aimed at anyone who had a role in providing funding advice to voluntary or community organisations, including funding advisors, group development workers, group support service managers, funding officers, funders, investors and freelancers.

The event examined issues around sustaining funding advice services in the face of changes to the way it is organised and funded and around transforming funding advice, both to sustain it and to meet the needs of the third sector.

The 37 delegates who attended the event, debated and discussed these issues, and attended working groups on specific aspects of sustaining funding advice, and workshops on a range of skills and knowledge for funding advice workers.

Opening Speeches

The event was opened by Jonny Gutteridge, Regional Funding Advice Network Manager, who updated delegates on the funding advice network and the learning needs survey and discussed the shift away from specialist funding advice.

Rachel Quinn, Chief Executive of One East Midlands, followed with a presentation on thinking ahead in response to the challenge of sustaining and transforming group support.

All the conference materials, including speaker presentations are available on-line at www.oneeastmidlands.org.uk/viewpage.php?page_id=107.

Debate

The event included a debate on the motion:

"This House believes that free local support on the whole range of grant and non-grant income is the sustainable future of funding advice."

Speaking for the motion were Eric Clayton, South Derbyshire CVS, and Jonny Gutteridge, One EM. Speaking against the motion were Grant White, Lincolnshire County Council, and James Kirkpatrick, Funding Support. The results of the audience vote were evenly split for and against the motion.

Working Groups

Before lunch delegates were split into four working groups, entitled:

- **Marketing funding advice:** to groups and funders, making sure they know we're the best
- **No time for guesswork:** getting fit for purpose, with the right skills
- **Doctor cure thyself:** the entrepreneurial approach to sustaining our services
- **Untapped resources:** possibilities for specialisation and collaboration.

The key points from each working group were then fed back and are outlined below.

Working group 1 - Marketing funding advice

Task:

- To generate a vision for a funding advice service that is great at marketing itself to the outside world.
- To discuss how far along the road to achieving this vision delegates are.

Key points:

- Funding advice services require branding, including references from those who have used the service.
- Word of mouth is important when passing on the usefulness of funding advice work.
- Feedback from clients is important to evaluate the service, promote it and learn from past work.

- Delegates in the group gave themselves an average score of 7.25/10 in achieving their vision. The next steps in taking their marketing forward were evaluation and client follow-up.

Working group 2 – No time for guesswork

Task:

- To generate a vision of a funding advice service that provides exactly the right funding support for the groups it wants to help, based on excellent knowledge of their needs.

Key points:

- Understanding is required of the groups being supported, including whether they are ready for funding support and where the group fits into the needs of the local community.
- Funding advice services need to develop so that they can provide resources to offer groups choices or be able to sign post them elsewhere.
- The expectations of groups need to be managed, possibly through an initial telephone assessment.
- Funding advice services must have local knowledge, link with other networks and liaise with funders.
- The key to success for funding advice services is being proactive and realistic, combined with marketing.

Working group 3 – Doctor cure thyself

Task:

- To generate a vision of a funding advice service that has achieved sustainability thanks to an entrepreneurial approach.
- To discuss how far along the road to achieving this vision delegates are.

Key points:

- The benefits of an entrepreneurial approach are independence, sustainability and a new and hopefully better way of working.
- Service users benefit from a constant service, which they can own and drive forward. Their needs are reflected better and faster and by having increased choice, they receive better services and value for money.
- Funders benefit from transparent representation, which is not tainted by politics.
- The skills and resources required are links and support from businesses and the ability to think outside of the box.
- The overall vision for the service is a networking partnership opening up opportunities, perhaps a social enterprise, where those involved value its work and are able to recoup the value.

- Entrepreneurialism can be evaluated by researching how much its service is valued. This includes asking how sustainable it is and how diverse its knowledge and income streams are.
- Delegates in the group gave themselves an average score of 4.2/10 in achieving their vision. Next steps in taking their entrepreneurial vision forward included a cultural change to become more business like, working with others to network and form partnerships, developing a more diverse range of services and increasing skills and marketing.

Working group 4 – Untapped resources

Task:

- To generate a vision of a funding advice service that has successfully collaborated with similar services and enabled its users to access specialist funding advice.
- To discuss how far along the road to achieving this vision delegates are.

Key points:

- The key outcome of this working group was the idea of further developing tools and approaches already generated within the EMFAN project into a collaboratively managed, centralised framework for improved funding advice. The framework would include signposting, training and quality assurance and could potentially be extended from regional to national level.
- The aims of the funding advice service are to provide honest advice and brokerage, target support, support collaboration, coordinate between general and specialist services, and increase investment readiness.
- The benefits will include clear routes to the right advice, learning and support for advisors, feedback and engagement for funders, a marketed advice system and the strength of a network.
- To achieve this links are required between the point of entry, funder engagement, service coordination, and skills and training.
- Overall delegates in the group gave themselves a score of 3/10 in achieving their vision. The next step was to increase awareness that the network exists.

Workshops

After lunch delegates attended a choice of three workshops entitled:

- Trends in grant funding
- Accessing support from the business community
- Developing a business plan that sells.

All the conference materials, including workshop presentations are available on-line at www.oneeastmidlands.org.uk/viewpage.php?page_id=107.

Workshop 1 – Trends in grant funding

Leads: Noel Singh, Policy & Partnership Manager, Leicestershire County Council
Sean Tizzard, Regional Manager – Development, Big Lottery Fund

Focus:

The workshop aimed to highlight and discuss recent trends in grant funding. Discussions included how good or bad these trends are, how they will affect how funding advice services are delivered, and the issues One EM can highlight in its work to influence funders and the government.

Key points:

- Grant funding is becoming more competitive and funding advice workers need to keep on top of the changes and improve their relationship management.
- There is a risk of losing out on existing projects as new ones emerge so their viability must be ensured. New models will not replace grants, which are here to stay.
- Funding advice workers need to make use of the new technology and working practices in place, including collaborative and partnership working.
- Groups need to identify their own priorities, including starting to think about new ways of achieving these. For example, social enterprises and investment generating. They must also change their “expectation” mindsets.

Workshop 2 – Accessing support from the business community

Leads: Catherine Foster, Senior Fundraising Manager, Derbyshire, Leicestershire & Rutland Air Ambulance

Focus:

Using the work of Derbyshire, Leicestershire & Rutland Air Ambulance as an example, this workshop discussed how funding advice workers can help groups to identify a match in the business centre and the value of fundraising from the business sector.

Key points:

- Groups should play on their “local” angle when building relationships with local businesses.

- The benefits to businesses should be outlined. For example, helping them to develop a corporate social responsibility profile.
- Accessing support from the business community should only be a small part of the overall income spectrum.

Workshop 3 – Developing a business plan that sells

Leads: Peter Hughes, Regional Manager, Midlands and East of England, Charity Bank
Rachel Quinn, Chief Executive, One East Midlands

Focus:

The aim of this Dragon’s Den style workshop was to assist delegates in developing viable business plans that can convince funders, lenders or investors that they have a low-risk way of delivering social impact.

Key points:

- Pitches need to focus quickly and with impact on individual funders.
- Groups need to be supported to develop plans for their own sustainability, including recognising their own unique selling point.
- Social finance and business migration skills need to be developed.
- Useful and concise tools for business planning and pitching need to be made available through EMFAN.

Closing Session

The event was closed by Jonny Gutteridge, Regional Funding Advice Network Manager, who led feedback from the workshops and asked delegates how far funding advice had progressed during the last three years and what the future of funding advice looked like.

Key points:

- EMFAN has helped to lift the lid on some of the problems funding advice workers are facing.
- The funding landscape is very different to how it was three years ago and the priorities and design of the EMFAN project need to change to reflect this.
- Funding advice workers need to become more entrepreneurial, changing their work from helping with groups with individual grants to helping them look at their current situation and how to maintain it.
- There is a possibility that social enterprise will become a new sector, outside of both the voluntary and community sectors, requiring its own funding advice workers. This will lead to diversity and separation between business and grassroots funding advice workers.

As the event took place on Jonny's last day working on the EMFAN project, the closing session also allowed network members to thank him for his work and wish him good luck for the future.

Actions and Recommendations Going Forward

Several actions and recommendations for the EMFAN came out of this event. These included:

- The network must actively seek new opportunities to improve use of existing VCS funding, unlock new funds for the sector, and continue to review the needs of the sector and therefore the skills required by funding advisors.
- The project and steering group should focus on developing the vision generated within the events' workshops, including:
 - Improving marketing of funding advice services;
 - Increasing collaboration and signposting to specialist services and working towards a shared delivery model;
 - Linking funding advisors to other sectors and stakeholders;
 - Monitoring the funding environment and developing the skills of funding advisors accordingly.
- The project must fully explore the forward potential of 'paid for' funding advice, as opposed to advice which is free at point of access, and develop approaches / make recommendations accordingly.

Feedback

We received 21 completed evaluation forms on the day, with pre-event information, administration on the day, the plenary sessions and the venue all scoring an average of over 4/5. However, when asked about the usefulness of the day, the score dropped to 3.8/5. Scores continued to drop for the panel debate, scoring 3.75/5 and the closing session, which scored 3.3/5.

The scores for the working groups ranged from the lowest score of 3.2/5 for *Doctor cure thyself* to a high of 4/5 for *No time for guesswork*. Scores for the workshops remained at similar levels, with *Accessing support from the business community* and *Developing a business plan that sells* both scoring 3.3/5 and *Trends in Grant Funding* receiving a slightly higher average score of 3.45/5.

Suggestions received for improving the usefulness and enjoyableness of future EMFAN events included:

- Longer workshops
- More time for questions
- An easier to found venue
- Improved parking
- Increased range of refreshments.

When asked how they thought their work might benefit from the event and what skills, resources and knowledge they had gained, responses included:

- More aware now of the trends - i.e. increasing partnership and collaboration - will be developing this next year with the organisations I support.
- At this stage difficult to say what I've gained but it was a useful forum to discuss and debate change and the potential impact on the service of funding advice. It will provide us with some thoughts for discussion about internal services.
- Thinking about how to sustain the service, charging for services etc.
- Better understanding of a 'business plan'.
- More knowledge of current practice and thinking from around the region.
- Really found the Derbyshire, Leicestershire & Rutland Air Ambulance session really useful.
- Useful new contacts
- General update / enthusiasm.
- Passing information on to headquarters and groups.

Other feedback received from delegates about support for funding advice workers included:

- The workshops were slightly different to what I expected, but they were a good way to challenge thinking and developing opportunity for debate.
- The idea of social enterprise for funding advisors / advice - explore further.
- Well done Jonny for keeping the EMFAN sustained - you've done a stellar job!
- Thanks.

Further work

One East Midlands will use the comments received throughout the day and through the evaluation forms to help move the EMFAN project forward and in the organisation of future events.

This event report will be circulated to delegates who attended the event and those who are signed up to the EMFAN e-bulletin. It will also be available online at www.oneeastmidlands.org.uk/viewpage.php?page_id=107.

Did we do it right?

We welcome comments on this report, the Sustaining & Transforming event and EMFAN overall. Please send any comments to:

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