



# **Independent Evaluation of the East Midlands Funding Advisory and Support Programme**

27 May 2013

## Independent Evaluation of the East Midlands Funding Advisory Support Programme

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### Introduction

1. One East Midlands (One EM) commissioned South West Forum in March 2013 to conduct an evaluation of the four year East Midlands Funding Advisory Support programme which was funded by the Big Lottery Fund under the Basis programme – Round two. The report focuses on a number of specific questions which One EM wanted the evaluation to address namely:
  - how efficient and effective was One EM in delivering the programme;
  - has the project raised the skills and effectiveness of Funding Advisers;
  - what are the opportunities and needs for further support
2. Information for this report was gathered through an on-line survey that had 39 responses; 40 interviews (either face to face or via the telephone) including a facilitated workshop involving 7 members of the steering group. [The steering group originally comprised 15 members, including the project manager and had a wide range of representatives from the key target groups including funders (Big Lottery and Charity Bank), several local infrastructure organisations and District Council representatives]. The evaluation also drew upon reports and documents provided by the project team.
3. A large number of organisations were invited to come forward and give their views and South West Forum was only able to interview those who chose to give their time. Hence, there is inevitably a self selection bias. But the profile and location of these groups has been monitored to reflect the geography and the stakeholder group (local authority/district council, funders, Voluntary and Community Sector (VCS) organisations and infrastructure organisations). We believe that the report reflects the views of a diverse range of organisations from across the East Midlands.
4. **We are extremely grateful to all those who took the time to fill out the survey or be interviewed and would like to acknowledge their frank and open contribution. We are also extremely grateful to the team at One East Midlands who provided the information needed for the analysis. Thank you.**

South West Forum  
May 2013

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## Background

1. The original BASIS bid was put together by Regeneration East Midlands (REM) in August 2008. The overall aim of the project was **“to provide support to people who provide funding advice to Third Sector organisations often described as Funding Advice Workers”**. The bid further defined the target audience as “A worker who as a part of their job role (including voluntary work) provides funding information and advice to organisations...enabling them to increase their fundraising capacity”. Funding advisers from the third sector<sup>1</sup>, public or private sector were all part of that initial target audience.
2. The focus of activity was intended to be training and networking and the development of a regional Funding Advisers Network which would provide a forum for shared learning, training and information sharing. The project also intended to support county-based Funding Advice Networks (FANs) where gaps existed. The project also envisaged development of an online signposting service that would provide advice on Funding Advisers and their areas of work.
3. The original bid identified the need as a lack of support for Funding Advisers at the regional level, no support system for existing FANs, a lack of on-line information about FANs and a lack of training, including accredited training. It also highlighted an increased desire by funders to work more closely with funding advisers. The need was based on REM research in 2008 and feedback from events in 2007/8. One EM was identified as a key partner along with other groups. The project started in September 2009.
4. The project has faced a number of challenges which have affected delivery and these have been borne in mind in the overall evaluation:
  - In January 2010, REM took the decision to wind down and cease trading on 31 March. The project was then transferred to One East Midlands and although it had continued to carry out its activities, there was an impact on the ability of the project to deliver its outcomes in the first year and the milestones were amended.
  - There were staffing changes mid way through the project (in late 2011) and a reallocation of tasks across One EM staff. This was done in agreement with BIG.
  - The third sector has been going through a period of considerable change over the last 2-3 years. A number of VCS infrastructure organisations in the region are going through Transforming Local Infrastructure programmes. Changes to traditional sources of funding have affected them and the organisations they support. Clear feedback from interviews has **highlighted capacity constraints as a major challenge** which has affected people’s ability to engage with the project.

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<sup>1</sup> The term third sector is used in this report to represent voluntary, community and not-for-personal profit organisations.

## Executive Summary

1. The evaluation addressed used a variety of approaches to answer three key questions:
  - Has One East Midlands (One EM) been effective in managing and delivering the project?
  - Has the project been effective in raising the skills and capacity of Funding Advisers?
  - What are the opportunities and needs in the funding advice field?
2. The evaluation showed that:
  - a) **Overall, the project has delivered the milestones agreed with the Big Lottery.** It has facilitated a wide range of events and training opportunities for funding advisers and supported Funding Advice Networks (FANs) across the region. It has monitored and evaluated its activities and been responsive to the needs of its target client group.
  - b) **The project has been delivered at relatively low-cost** with a budget of approximately £80,000 per year (a large part of which is staffing costs). In the full three year period that the evaluation considered, the project delivered training and events to over 630 participants and supported a network which now stands at 283 members.
  - c) **One EM is very well regarded by stakeholders** although there are differences of opinion about the value and role of a regional infrastructure organisation.
  - d) There is **good evidence that the project has built the capacity of funding advisers**, their confidence, skills and understanding of new trends. However it has not been possible for the project to clearly demonstrate a subsequent link to better quality advice and directly attribute a value to that advice, largely because funding advisers themselves only evaluate their impact in an ad hoc way
  - e) The **original concept was extremely ambitious** and some of the outcomes (particularly Outcome 2 – establishing a baseline and measuring quality and impact of advice) needed to be delivered in a different way than originally envisaged.
  - f) The **premise on which the concept was based** (the existence of people whose main role was funding advice) has changed radically throughout the lifetime of the project. The key message now is that funding advice does not exist in isolation and the needs of those working in the sector are changing as jobs are restructured and the needs of front-line groups shift. One EM has been very effective in conducting its needs analyses but this may need to be revisited in 2014.
  - g) **At times delivery has not been consistent.** The project suffered from slow start which delayed training; a change in managing organisation and staffing changes in Year 3. All these issues were discussed with the funder throughout the lifetime of the project and appropriate action taken. Nonetheless, the project met key targets.
  - h) **One EM have taken on and tested innovative ideas** which will provide valuable learning for the wider sector. The project has **tested new ways of measuring quality of funding advice** and linking that to the project support, but this has not achieved

clear results - not least because recipients of funding advice rarely let funding advisers know when they are successful.

- i) The project has **developed innovative on-line tools** for signposting individuals to funding advisers and for monitoring the results of funding advice in terms of successful applications, neither of which have achieved the full results that were hoped for. However these innovative ideas have been well tested and **the learning should be shared at a national level.**
- j) **The Funding Monitor concept is supported by groups but lack of capacity has affected take-up.** The concept should be looked at on a national level and there may be a role for BIG Lottery/NAVCA/NCVO to look at this tool and consider whether it might be developed into a national resource.
- k) There is **strong support for FANs** and the opportunities they provide for peer support, networking and meeting funders. However the project has not been able to meet the original aim of ensuring a strong FAN network across the region and there are still gaps and weak spots. There is a clear message is that FANs work best where there is adequate resourcing.
- l) The **needs of the sector in terms of future support are very diverse.** Those who favour a regional infrastructure look for support in understanding new developments (such as social value), specialist training that can best be delivered regionally, networking and information opportunities and a mechanism for the region to have a voice and influence at national level. Others would like to see a regional body take a lead in brokering partnerships to bid for larger contracts or European Funding.
- m) There are **real challenges for the sector** in meeting these diverse needs: a lack of resources and capacity; challenges with continuity with radical changes in the sector; the need for a culture shift encouraging groups to move away from traditional sources of funding support towards a more enterprising and diverse approach to income generation.
- n) Many in the sector see a **continuing need for a regional infrastructure** that bridges the gap between local and national – but this is not a universal view. One EM needs to ensure that **future activities are effectively targeted at areas of most need**, accessible to as many people as possible and time-efficient. It also needs to consider new opportunities (such as webinars) to communicate with those who do not have time to attend.
- o) There is a **real challenge around sustainability.** A previous survey in 2011 indicated that although people were prepared to contribute to the cost of training and events, they were unlikely to pay the sort of fees that would enable full cost recovery. Although many people value the resource that the EMFAN project has offered, the project has not been able to identify sources of funding that could replace previous grants.
- p) **Learning from other regional FANs is very similar**, with a number seeking to restructure or re-organise their activities in the light of capacity constraints. There is a general view that bridging organisations are needed to connect groups to funders and to support them to develop the capacity to be fit for funding - but that this function needs resourcing to survive.

## Section 1: One EM's effectiveness in managing and delivering the project

### Key Questions

- Has One EM delivered the project within the timescales identified so far?
- How efficiently and effectively has One EM delivered the project? (Including assessment of internal capacity, finances and resources)?
- How is One EM perceived and valued by key stakeholders and members including public sector partners

1.1 Annex E provides a summary of the original milestones and timescales and summarises progress across three and a half years. Despite the fact that there was a change in managing organisation in year 1 leading to some amended milestones and a change of staffing in year 3, **One EM has ensured that the project has delivered the key activities within the required timescales**, although some of the original Key Performance Indicators (KPIs) were amended in the light of ongoing learning and evaluation. The project has delivered across the four outcomes. In summary it has:

- Undertaken two thorough training needs analyses and used these as a basis for designing programme delivery.
- Delivered an annual learning programme and evaluated training and events.
- Considered and tested approaches to developing baseline measurements for evaluating quality and effectiveness of funding advice.
- Supported one regional and two sub-regional networks and developed links with all the networks across the region. It has been particularly effective at supporting and encouraging new networks.
- Developed a database of funding advisers, set up an on-line signposting service and an online monitoring process for measuring the difference that funding advice has made. The ongoing value and effectiveness of these resources is addressed in the final section of this evaluation.
- All training and events have been monitored and evaluated and the programme has continued to adapt to feedback and changing demand throughout the three years.

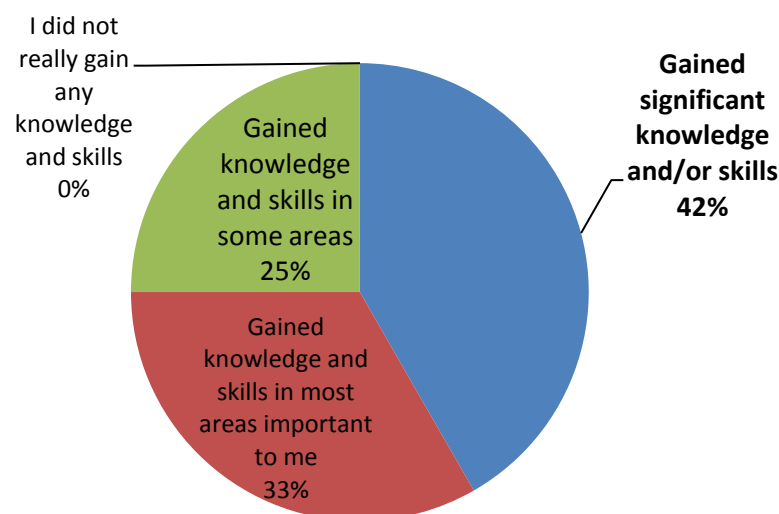
1.2 In terms of efficiency and effectiveness :

- The **project was slow to start** as a result of the winding down of REM and the project transfer. This was outside the scope of One EM to influence. In addition, in Year 3, following the departure of the Project Manager, activities were spread across a number of One EM employees and this had an impact on the management of the project, including the financial management processes. There was also a dip in the numbers attending One EM-led training and events in 2011. However, the delay in recruiting a replacement Project Manager was appropriate as it was taken in the context of an ERDF project development and an opportunity this presented for two

projects to work together for the benefit of the sector. The outcome has been a more sustainable support model for funding advice going forward beyond the end of the project.

- The **on-line aspects of the project**, in particular building up the project databases, developing and marketing Fanoogle and Funding Monitor appear to have taken up a great deal of time and effort but did not achieve the results originally intended. (For more detail on these services see page 14.) However, the value is that the project has tested some innovative approaches and this learning should be shared at national level.
- The **training, events, information and networking opportunities** offered by One EM were delivered effectively. Access to new information and networking are consistently rated by respondents as a major benefit arising from the project. Some of the larger events that brought information sharing and learning sessions together were particularly valued e.g. ‘The Big Sell’ where groups welcomed the focus on new ideas and challenges. When asked what knowledge and skills they had gained from training, those who responded to the on-line survey gave strong positive responses, although it should be noted that this was a relatively small sample and the feedback from the events tended to be slightly less favourable.

#### Did you gain new skills or knowledge from EMFAN training or events?



- The core training programme ‘How to Excel in Funding Advice’ was heavily subsidised and some of the sessions were not well attended, but the evaluation suggests that **most participants thought the training would make a difference to the sustainability of the groups they worked with** and that participants gained skills and confidence. The programme was clearly of most benefit to those new to funding advice and more experienced funding advisers reported fewer benefits.
- The programme has **delivered activities across the region** and has aimed to make its events and activities accessible to as wide a range of Funding Advisers as possible.



1.3 In terms of **how One EM is perceived by key stakeholders**, including public sector partners, there is a great deal of positive feedback about the project and the effectiveness of One EM. *“Very efficient and providing services which are largely complementary to local CVS”.....“Networking....enables groups to tackle some of the really strategic issues”.*

1.4 However there is an underlying divergence of view about the relevance and role of a regional infrastructure organisation:-

#### Those in favour of a regional FAN network thought...

- The **regional network challenges thinking**. The regional capacity helps to bring in capacity and highlight issues beyond the local. Creating opportunities for people to meet and discuss ideas is useful. One comment that reflected a number of views was *“Just having funding advisers working in isolation is not good and they need links to other parts of the sector. There are new developments around contract and investment readiness, influencing commissioning etc. and groups need support to face those challenges”.*
- The regional network **boosts the capacity** of smaller infrastructure organisations to understand some of the new agendas (Social Value Act, social investment, personalisation etc) and adapt to change. *“A regional network can add value by bringing in funders and cost efficient training”.*
- The network **boosts the capacity of organisations to access funding** on a bigger scale. Accessing European funding was seen as a key role for One EM.
- The **regional network allows groups to advocate for the sector** and to *“stand up for the East Midlands”*. One of the unexpected outcomes of the project in Year 1 was the ability of the network to influence funders by highlighting the concerns expressed by groups around online grant application processes leading to action at national level.

#### Those who were not in favour thought...

- **Working at a local level was more important:** *“There has been a value in good information and e-bulletins but the local is much more important to groups than the regional”*. In particular capacity constraints mean that regional activity is less of a priority *“networking is lovely but we don’t have the time”*. A local authority officer commented that this lack of emphasis on regional collaboration was also evident within the local authority networks which were now defunct.
- **Some look to the national level for support** - larger county infrastructure organisations felt they would look to national organisations for support rather than a regional body *“we are sub-regional and relatively autonomous”*
- Capacity constraints mean that **regional activity has become less of a priority** for both social purpose and public sector staff. *“As funding is getting cut it is getting harder”* ...to take time out to attend events.

## Section 2: The Project's effectiveness in raising the skills and capacity of Funding Advisers

### Key Questions

- Has the project achieved its 4 outcomes for Funding Advisers beyond the projected project deliverables?
- To what extent have FAs developed their skills and knowledge as a result of the EMFAN project?
- What have been the benefits to local Funding Advice Networks (FANS) of the support provided by the EMFAN Project?

2.1 The project envisaged four key outcomes. (Although defined as outcomes, these are outputs, the overall outcome of which is to raise the skills and capacity of funding advisers). In brief they comprised:

- An annual learning programme monitored and revised to meet changing needs.
- Establishing a baseline of applications to measure quality, eligibility and demand to monitor improvements
- Introduction of a regional and two sub-regional networks
- Access to 150 Funding advisers by fund seekers through a web-based signposting service with impact tracked by application success rates.

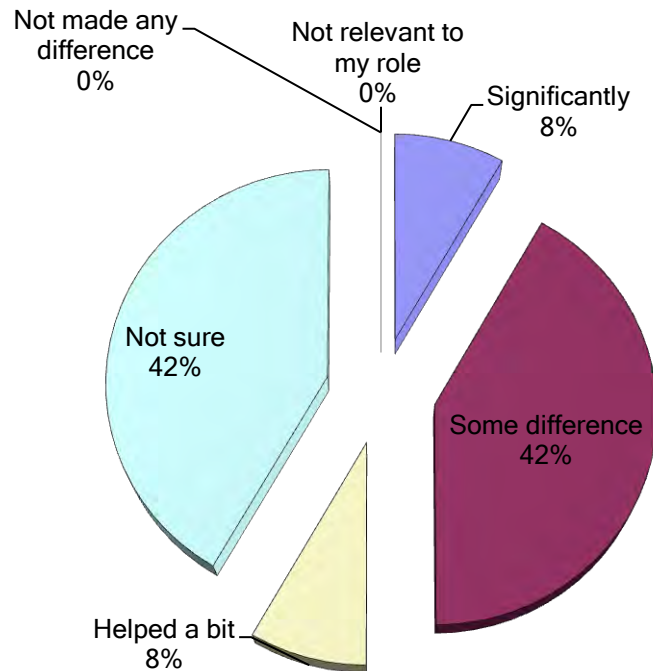
### Outcome 1: The annual learning programme

2.2 The full evaluation is set out in Annex C. Key learning points are

- Overall, **the programme scored consistently well** for practical delivery and support arrangements and the larger events were particularly useful in exposing funding advisers to a wide range of ideas and connections in a time efficient manner. The core training programme was well reviewed.
- The programme was underpinned by two detailed training needs analyses and **the learning programme addressed the majority of these areas** either through the training courses or through the larger events and workshops.
- The **feedback suggests strongly that those who attended developed skills and knowledge**. 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.
- Feedback from the on-line survey (page 11) suggests that **the skills and knowledge gained made some difference to application success rate** but it should be noted

that this was a small sample and none of those interviewed were able to give an example of where training had directly contributed to a successful application.

**The skills and knowledge gained has resulted in an increased funding application success rate:**



- **The project had some numerical targets which were met in part.** The larger events were very popular, the bespoke training attracted fewer participants. 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.

## Outcome 2: Establishing a baseline of applications to measure quality, eligibility and demand to monitor improvements

2.3 The original aim of establishing baseline to measure improvements in the quality of funding advice was very ambitious. The Year 1 'End of Year report' suggested that although the project had been successful in securing support for its ideas around data capture from a number of funders, this was a smaller group than the 15 originally envisaged. The programme adapted well to this and looked at a number of ways in which to measure outcomes through surveys and Funding Monitor. However a consistent message from interviews is that there are a number of barriers to measuring effectiveness of advice:

- Front line groups are often unwilling to offer feedback and funding advisers often find out by chance if a group they have supported have successfully bid for funding. The online tools were notable to address this.
- Sometimes the impact of advice may not be felt for a period of years. A group may seek advice and then not take ideas forward until sometime later. This is difficult to track.
- Funding Advisers lack the capacity to follow up. Feedback from the survey shows that the majority follow up on an ad hoc basis.
- Some of the larger infrastructure organisations have questioned the approach of seeking to measure success through a monetary approach and are shifting instead to using other evaluation approaches such as 'Theory of Change' to try to understand how to measure the difference that infrastructure organisations make to whole communities.

2.4 It was hoped to identify a case study as part of this evaluation but this was not possible. Other organisations such as Funding South West have invested in research based on case studies (<http://www.creatingexcellence.org.uk/regeneration-renewal-news227.html>) and this approach might be considered going forward.

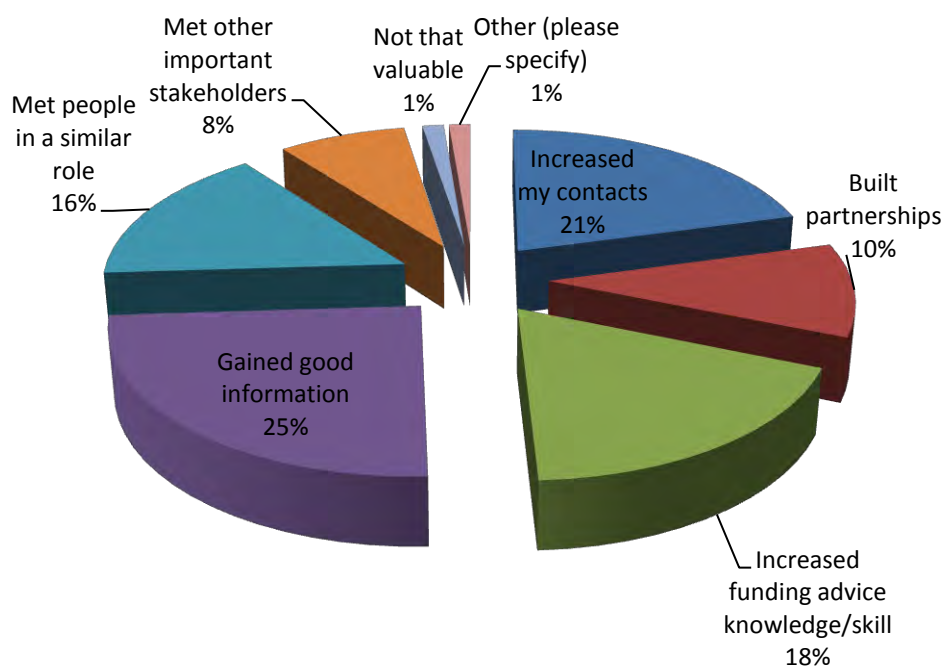
## Outcome 3: Introduction of a regional and two sub-regional networks

2.5 There has been consistent support for regional and sub-regional networks across the programme period but with a particular focus on Northamptonshire and Derbyshire in the early stages. In the final year of the project there has been a renewed emphasis on connecting with all the local FANs and encouraging development of FANs where none exist. In the early stages of the project, the project manager took a very active role in the organisation of some of the FANs and this raised a question about the sustainability of that model. Feedback from interviews suggests that some FANs relied on the project manager for support and this did not always work well. The current approach of engagement and support, but with a focus on enabling and offering skilling up and networking (rather than leading) are more likely to be sustainable.

2.6 The interviews and on line survey (full results at Annex A) also showed

- **Opportunities for peer support and networking are the very highly valued outcomes** of the EMFAN programme. The online survey indicated that 76% of respondents valued this highest. *“A professional network should be about sharing good practice and support”*
- **FANs are valued by those who participate.** When asked to rate the services delivered by EMFAN, the highest score was local FAN meetings which were rated as the highest value by 37% of respondents. With a further 22% indicating that regional network events were the most important for them. The chart below indicates the survey responses to this question

#### WHY ARE FANS IMPORTANT TO YOU?



- FANs are a valued **opportunity to connect with funders and other key stakeholders.**
- The project had hoped to address issues around quality of the FANs but this has not been fully addressed and there are challenges with the FAN model which remain. Respondents suggested that there are weaknesses with some of the FANs which lack a clear external driver for change. There are varying levels of local engagement which are beyond the capacity of the project to address. Some see FANs *“as a luxury and not a priority”*
- **FANs need resources to be effective.** Those that have worked particularly well have local council support. A number of respondents said that their working hours have been cut and they no longer have time to participate in network meetings.
- **The focus on funding is perceived by some to be outdated.** The majority of survey respondents spend between 25-50% of their time on funding advice and a network which is seen to be aimed at funding advisers is a turn-off for some who see their role as a broader one of organisational sustainability. *“The name Funding Adviser is very old hat”.*

Outcome 4: Access to 150 Funding advisers by fund seekers through a web-based signposting service with impact tracked by application success rates

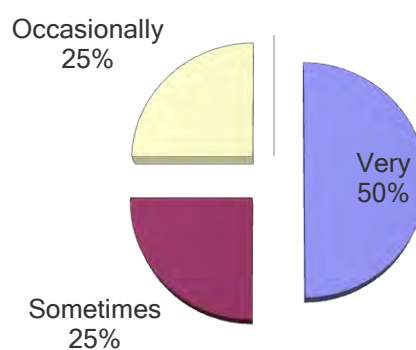
2.7 The project has piloted two very innovative approaches – Fanoogle and Funding Monitor. Fanoogle is a web-based signposting service which groups can access to find their local Funding Adviser. It relies on funding advisers inputting their own details and on users completing a simple form. The service has made good progress and by the end of Year 3, 178 people were registered but one comment in a recent survey of funding advisers using Fanoogle sums up the views of many: *“Fanoogle is a great idea but not sure how many local groups would use it as a source of information”*.

2.8 Funding Monitor is an online tool which is designed to enable everyone involved in grant funding to share what they are up to and generate analysis to help learning and improve the grant making process. Although the concept is strongly supported by those interviewed, there are a number of reservations about the approach which the project has sought to address:

- It is considered to be **resource intensive and over-ambitious**. One comment summed up a number of views : *“Although in principle the idea sounds good, in practice it is contingent on all parties playing the same game and not all groups will feed back on whether the advice they have received has been useful or not”*.
- In some infrastructure organizations, there is a **shift away from putting a monetary value on the impact of advice** towards looking at a wider social value - evaluating community outcomes and the difference that advice (be it funding or other advice) makes to someone’s life.

2.9 It is worth noting that whilst the majority of survey respondents skipped the question about Funding Monitor, the eight people who answered this question (and were presumably users of the service) rated it highly suggesting that the approach has merit but that capacity is the key reason it has not taken off.

How useful is funding monitor as a source of information, tools and funding advice updates?



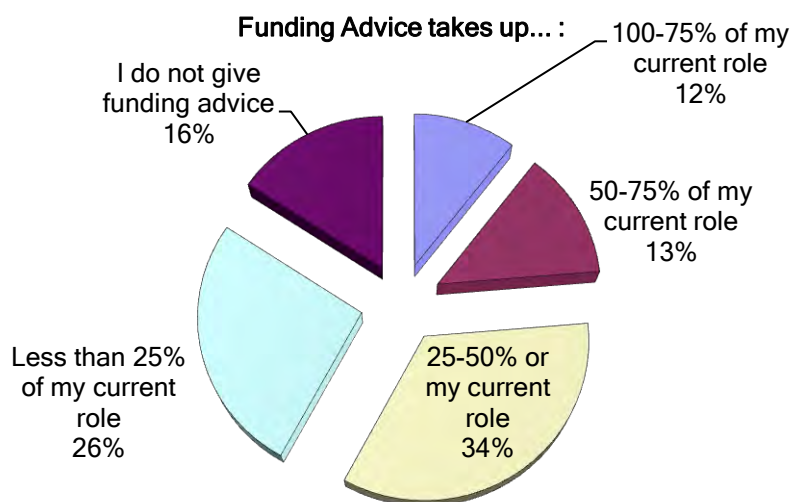
### Section 3: The opportunities and needs for further improvement and development in the funding advice field.

#### Key Questions

- How do funding advisers view ongoing professional development through the EMFAN regional network?
- What demand and future development is there from Funding Advisers to continue the work of the EMFAN project?
- What are the identified areas for improvement alongside areas of best practice?
- What are people’s ideas about which elements of the project they would like to see continued and how One EM might make this happen?

3.1 The original learning needs analysis showed that the learning needs of funding advice workers varied in terms of demand, level and subject and this remains true. The funding advice sector is very diverse and where to target future support will depend very much on how One EM defines its target audience. Feedback highlighted the following trends:

- **Very few people are full time funding advisers.** Only 10% of respondents to the online survey indicated that funding advice was 75-100% of their role. This reflects a trend identified by the project in 2011 which it has sought to adapt to. The model of larger events with workshops on specialist themes seems to have worked well for this group.



- Funding Advisers are not a homogenous group and there is no ‘one size fits all’ approach. At a local level, many of the funding advisers see **their primary role as finding funding for groups and connecting with potential grant funders.** Those new to funding

commented that they found the core training extremely helpful, in particular the Fit 4 Funding training whereas more experienced funding advisers gained fewer benefits.

- However a number of others saw their role as **advising on sustainability** (including funding and organisational development) and were looking at delivering support across commissioning and social enterprise as well as grant funding. One comment summed up this group: *“Funding Advice per se is dated...the name Funding Adviser is very old hat”* – the implication being that a ‘Funding Advisers Network’ would not be attractive to those who saw their role as a wider one.

3.2 In terms of **ongoing professional development**, the online survey and interviews highlight the very wide range of needs of the sector. Feedback has been grouped into the following broad areas (which appear to reflect the 2011 training needs analysis):

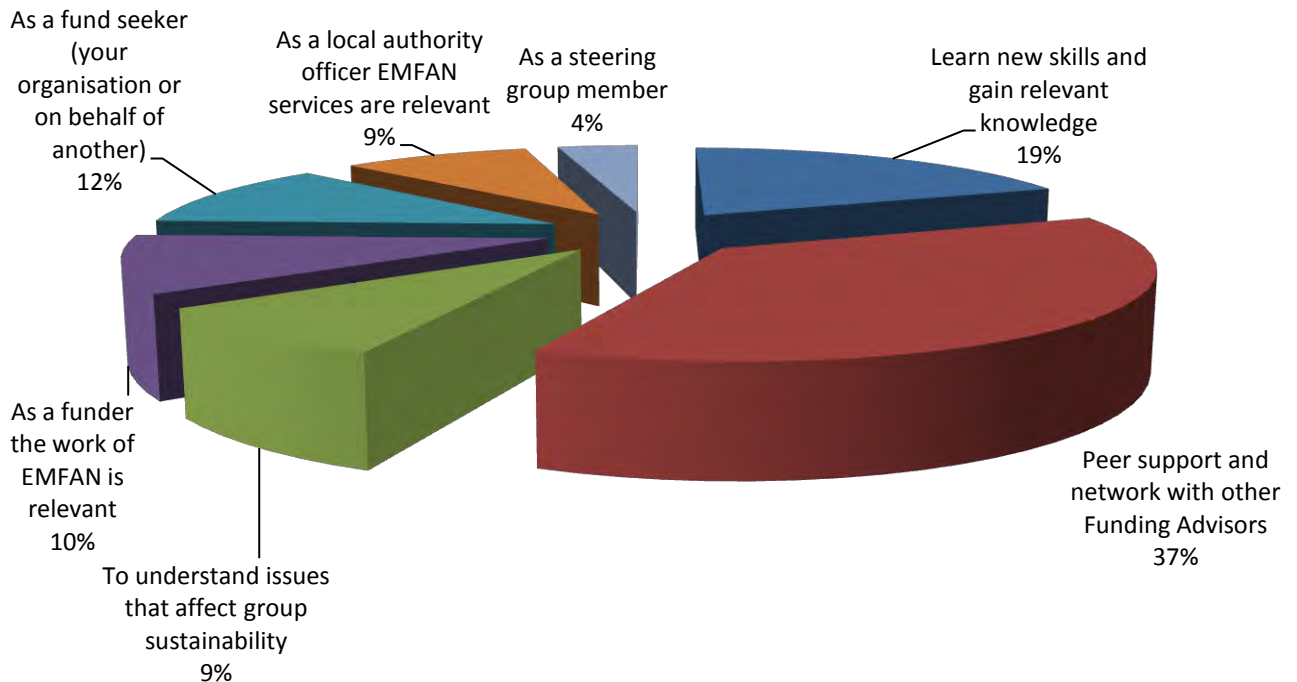
<p><b>Information</b> –staying up to date and informed about changes affecting the sector such as Social Value and Social finance Information. Getting information about funding opportunities – in particular new funding streams such as European Funding <b>Commercial awareness</b> – business planning, charging for services, contracts and tendering, project management etc</p>	<p><b>Quality</b> –sharing information about what advice has been successful and what works</p>
<p>Better use of <b>online opportunities</b> such as webinars, Skype etc.</p>	
<p><b>Training and development</b> – support with issues such as governance, gift aid.</p>	<p><b>Connecting</b> - meeting each other and funders to learn from each other</p> <p>Impartial and independent <b>one-to-one support</b></p>

3.3 There was also feedback indicating that people value **One EM’s role as a strategic leader**, both in enabling training and networking that meets the needs of a changing landscape but also in looking for opportunities to bring people together to access larger sources of funding. Others wanted a regional voice to influence policy at national level. *“I don’t think NCVO understand the regional context enough. One EM does understand and is committed”*.

3.4 **Demand from Funding Advisers for the continuation of the project is difficult to gauge.** There is a strong appetite among respondents for a regional resource that informs and connects people and that enables people to network and get peer support from other funding advisers or to learn new skills (see the feedback below). There is also some support for accredited training (although this is based on a small number of responses). But this response has to be tempered against the clear feedback that although people would like to have these resources, on a day to day basis their capacity to engage is limited for both time and cost reasons.



## What is your main reason for being part of EMFAN?



3.5 In some respects it is **premature to make clear recommendations about future support needs** as a number of infrastructure organisations going through the Transforming Local Infrastructure programme and some of the larger CVS organisations are currently radically re-thinking their own approach to support for front-line groups. As one commented: *“We are currently debating how specialist knowledge is acquired and how much is desired.”* A number said that they are now looking at funding advice as something that needs to be part of general group support – *“It is more about helping them to be business-savvy, to cost services and to develop a relationship with their service users”*. That said, there are clear support needs around:

- Information about new trends and sources of income for organisations
- Advice on sustainable business models for social purpose organisations
- Encouragement and support on evaluating the outcomes of advice and demonstrating the wider impact of the support
- Creating opportunities for networking - be it at regional or sub-regional level, particularly events that bring together funders, local authorities, social purpose and private sector organisations

3.6 In terms of **identified areas of improvement**, overall feedback was very positive about the training and events that have been delivered as well as the support for the FANs. However the feedback has highlighted a few areas for One EM to consider:

- The online tools – Fanoogle and Funding Monitor don't yet appear to offer real value for the sector, although there is stronger support from Funding Advisers for the concept of Funding Monitor and recognition that there should be greater evaluation of the outcomes of support given to groups. The project appears to be addressing this feedback in its final year.
- The fundamental principle underpinning Funding Monitor is questioned by some who are shifting to alternative approaches to evaluating their outcomes and impact (such as Theory of Change).
- The capacity of groups to engage in training and development is diminishing. The approach of hosting larger events with a range of workshops seems to work well for many – although feedback from some of the larger events is that there should be sufficient time to allow the workshops to be really useful. One EM also needs to consider “a smarter way of communicating with people who haven't got time to attend”.
- If the FANs are considered a real priority, then there needs to be continued engagement and support from One EM as there is a perception that this support dropped off in 2012 and the quality of FANs still varies across the region.

## Conclusions and Recommendations

- i. The EMFAN project has delivered an **innovative and responsive programme** and there is evidence that the events and activities have made a **positive difference to the capacity and skills of funding advisers**.
- ii. The project has been **particularly effective in bringing together participants from local authorities, public, private and social purpose sector** organisations who might not make connections in the normal course of their work.
- iii. A core strength of the project is that it has **enabled organisations to understand the wider context** within which they are working and has expanded to include new themes such as personalisation and social finance. Having the project embedded within the One EM team has added value in terms of the sharing the policy and information work that One EM undertakes with Funding Advisers.
- iv. One EM has effectively **managed an ambitious project and delivered outcomes in the timescale while remaining responsive to the changing needs of the sector** over the last three years. There has been a consistent focus on evaluating need and then seeking to provide activities that meet that need in a flexible and responsive manner.
- v. **Respondents value the training and development opportunities** offered by the project and Funding Advice Networks are valued where they work well and are supported. Funding Advisers really value the opportunity to network and access information that is useful to their groups and this is their number one priority.
- vi. The **context has changed radically** and many Funding Advisers are no longer in place or have taken on additional responsibilities. Third sector organisations we spoke to are clearly finding capacity constraints the biggest challenge to training and development.
- vii. The **target audience for the project has shifted**, with funding advice now part of a wider role for many. One EM needs to consider whether the way in which the support is branded should be changed to make it clear that the project supports wider organisational sustainability.
- viii. One EM needs to ensure that it **identifies and focuses on its key audiences and areas of greatest need**. The original project target group was extremely wide (effectively anybody in the region offering funding advice). Not all funding advisers need support and some FANs are doing well without One EM input. The Transforming Local Infrastructure programme will also change the shape of infrastructure in the East Midlands and the type of services offered. How front-line groups access support around funding and organisational sustainability will change over the next year, as will the support needs of organisations and individuals delivering those services.

- ix. **Accredited training is valued by some** – particularly those new to funding advice and it makes sense to deliver this at a regional level to achieve the cost efficiency of delivering it to a larger group. But numbers interested in this are relatively small.
- x. The **on-line tools have been time consuming and need capacity** to be effective, at a time when capacity is increasingly limited. This needs to be taken into account in considering the longer-term future of Fanoogle and Funding Monitor. However both tools offer useful learning to the wider sector.
- xi. Although Funding Monitor faces real challenges, it is evident that those with responsibility for offering funding advice need support if they are to find appropriate approaches to monitoring and evaluating the outcomes of that advice. Most of those interviewed indicated that their approach to evaluation is ad hoc and something they find really difficult. We recommend that **One EM should share the learning about Funding Monitor at national level (e.g. with NAVCA and Funding Central) to consider whether this resource, or an alternative, could be developed and resourced.**
- xii. Some infrastructure organisations are now looking to evidence the **wider social, economic and environmental outcomes resulting from their interventions.** One EM might consider alternative approaches to measuring outcomes from Funding Advice and how best practice could be shared with the wider sector with a particular focus on how funders and commissioners are moving towards outcomes-focused approaches.

This study was commissioned by One East Midlands and undertaken by South West Forum. The research was conducted by Beverly Jones, Deborah Fisher and Jane Smallcombe and other members of SWF team. South West Forum supports VCSE groups to be better at doing what they want to do. We strive to enable an influential voice for South West voluntary groups with government and other key decision-makers. We offer a range of services including training and consultancy. See [www.southwestforum.org.uk](http://www.southwestforum.org.uk) for more information.