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**HEARING FROM THE FRONTLINE IN YORKSHIRE**

**ONLINE FORUM**

**19TH SEPTEMBER 2024**

**Summary**

R4

**Recording of session:**

<https://zoom.us/rec/share/d3dQ3nAbVVXkjex7KstdhLDQ7OsfiAz6ybrtplDFd-JATHvba1SfpKmKXaMf5QJD.NXBcaXRJVLP8OzED?startTime=1726736564000>

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**Ben Cairns OBE, Director of IVAR (Institute for Voluntary Action Research) and convenor of the UK Open**

**and Trusting Grantmaking community. IVAR’s research and talking to frontline charities and groups shows**

**that:**

* Funders should make their eligibility criteria, their funding priorities and success/grant prospect rates much clearer on their website and in other communications material.
* If you’re turning down a large percentage of applicants, you need to be tougher and tighten up your criteria. It is draining for grant seekers to spend so much time and energy on bid writing and not getting a grant.
* It’s ok to say no to grant seekers and tell them they don’t stand a strong chance of getting a grant. Don’t waste their time and tell them this at an early stage in the process.
* Really good to have a simple expression of interest stage in your application process and only encourage applicants who you really feel meet all of your criteria to go to the second stage and complete a full application. This saves time for applicants, assessors and trustees/panels.
* It is really important to talk to applicants and ideally visit them as part of the grant assessment process as this builds relationships and improves the funder’s understanding of what and how the applicant works.
* Act with more urgency. Lots of funders did this during Covid so we should be aiming to continue this faster pace of funding and decision making now.
* Be more transparent about your whole process and don’t leave grant seekers guessing what you are looking for/wanting to fund.
* If you are finding it hard to give meaningful, or any feedback, then publish who and why people were successful. Introduce more honesty into all stages of your process.
* The benefits of multi-year funding for grant holders is so beneficial. There is a need for multi-year core funding and one-off grants so try to do both.
* Moving towards unrestricted funding is vital as it gives flexibility and freedom to the grant holder. This could mean starting off by giving more flexible grants and funds which allow for full cost recovery from the applicant.
* When it comes to grant holders’ reports, tell people what you do with them and how you use them. This will encourage conversations which both the funder and the grant holder will learn from and you will be more informed. And if you’re not doing anything with the grantholder reports, why not?
* When you improve all of these elements you are helping to shift the power balance between grantmaker and grant seeker which is vital.

Q&A

* Confidence and capacity are the two key reasons why many funders don’t talk to/visit applicants. Grantmakers should consider re-purposing their time and asking, What can we spend less time on/take out of our process so that we can make time for conversations and visits with applicants?
* Grant staff and boards need to know it is ok to say no and some training on this might be needed.
* Give unrestricted and/or multi-year funding a go. It’s time to end the dominance of short term grants. It is a journey and funders need to be changing and updating their processes.

**Lindsay Oliver, Founder of the small Harrogate-based charity New Beginnings**, which provides a peer support after-crisis service for women and children who have left their abusive situations.

* Our workload and level of referrals keep increasing and as CEOs/Directors we are spinning so many plates, but securing funding for leadership salary costs is such a challenge. And many funders that will give a grant for senior leadership costs will only give 10-20% of the total.
* Unrestricted or flexible grants are so helpful and other things I find beneficial are:
  + Conversations with funders.
  + Being asked good questions – What do we need money for? Not what does the grantmaker want to fund.
  + Visits by funders are key and it’s important both sides are on the same page when it comes to language and really understanding what the organisation does. Conversations and visits can help with this.
  + Getting sent a reminder about when to be sent an end of grant report is really great and so are grant management systems which automatically complete your basic organisation information when you are applying again to the same funder.
  + Shears Foundation does all of this and are fantastic to work with.

**Dr Richard Colbrook – Founder/Chair of Flourishing Families Leeds**, a medium sized charity which works to bring down the barriers that hinder people from flourishing through programmes including the mentoring of children, family cookery clubs and literacy programmes.

* Ask yourself, what is your organisation aiming to achieve?
* We are always looking to develop partnerships with our funders as well as our beneficiaries and visits where funders can meet our families and see our work in action are so important.
* Funders should aim to be more agile, flexible and form partnerships with their grant holders. Relationships are key.
* We are happy with unrestricted or restricted funding as we have partnerships with all our funders.

**Kelly Broadbent, Whole System Approach Lead at the national charity St. Giles Trust** which works across Yorkshire with a team providing a range of programmes spanning employment services, rehabilitative work with people who have been in the criminal justice system, support for families of offenders, as well as preventative work in schools and other educational settings. National turnover of £18m+.

* North Yorkshire challenges:
  + Central fundraising team applications.
  + Misconceptions around North Yorkshire and levels of deprivation and multiple issues in families.
  + Local knowledge/hidden harms/needs = find solutions.
  + Local funding opportunities often aimed at small charities.
  + Time taken for applications/reporting.
* Suggestions:
  + Consider local funding applications for larger charities based on local needs and budget limitations and repeat funding.
  + Relationships - funders to be invited to ‘the table’ to contribute to decision making, learn about local intelligence for transparency and confidence building.
  + Visit the provisions being funded to witness the service and impact.
  + Voice of the client in applications.

Q&A

* There needs to be a fundamental change in mindset. Rip up the rule book when it comes to your process and review it all if you’re going to make the changes suggested.
* There is a lot of learnt behaviour in the system – both as funders and applicants. Ask yourself, what is the worst that is going to happen if you try something different/new? But also, why are you doing it?

**Headlines from break-out groups:**

1. **All groups felt they needed to do more in the areas of unrestricted and multi-year funding and giving meaningful feedback.**
2. **Funders should carry out visits as part of their assessment practice (vital it is before a grant is given) and/or have applicants or grant holders attend board meetings/panels and share why their work is making a difference.**
3. **You could ask grant seekers how they might re-write the rule book and what their ideal application process would look like.**
4. **We must get the message across that we have to improve the grant process for grant seekers.**
5. **Learning how to build partnerships would be useful for many funders.**
6. **Make sure your message is consistent on your website and consider having an eligibility quiz to help refine the application process.**
7. **WE ARE COMMITED TO WANTING TO DO BETTER.**