Yorkshire Funders

Members Day and AGM

18 November 2024

**Notes from Getting the Fundamentals Right workshop**

Following the group work in small groups to identify the key elements of the grantmaking process, discussing good practice and areas of challenge (see table at the end for a summary of this), the group identified areas for more detailed discussion on ideas for improvement.

**Key points raised:**

* It was felt that critical to the whole process was the **culture and ethos** of the organisation and having the right **governance** in place. Feedback from IVAR that how trustees/grants makers interact can often be passed onto how the organisation interacts with applicants. A board that quizzes all grantmakers actions can lead to that process being very risk averse and transactional.
* **Application process** - visits or calls were identified as critical components to a good process, how information gathered needs to be used to inform evaluation of impact and what the future implications are for the use of AI by both applicants and grantmakers. (More detailed notes are below).
* **Monitoring and evaluation** – a lot of variability in what is asked for in monitoring, and how it is used by the funder (if at all).(Note from a legal perspective evidencing funding has been used for charitable activity is a responsibility of the funder). Similarly, funded groups can be variable in their ability to provide evidence of impact (although some funders still focus on evidence of spend which is not the same thing). Agreed it is an area where more information or learning from others would be welcome.

**Opportunities for learning identified**

* Peer learning – can Yorkshire Funder facilitate sharing knowledge and practices among funders to address challenges collectively?
* Emerging tools and trends – how can Yorkshire Funders help funders explore the implications of AI and climate-focused funding for future strategies?
* Capacity-building initiatives – what is needed to support applicant organisations in understanding grant requirements and improving their reporting capabilities?

**Discussion areas**

**The application process**

Simplification and clarity for applicants - ensuring application forms are concise, clear, and only ask for essential information, e.g. YCAF

Alternative methods to a form - exploring options like eligibility quizzes, expression of interest forms, or phased application processes to reduce administrative burdens. Also seek to incorporate a visit or a call into the assessment process.

Support during applications is critical - providing opportunities for applicants to seek guidance via phone or email can save time for both applicants and grantmakers.

Emerging trends – can application forms be adapted to address issues such as climate change and the increasing use of AI.

Inclusivity – do we consider how to measure diversity, such as by collecting data on board makeup or geographical impacts through the application process?

**Monitoring and Evaluation**

There is a need for standardisation and clarity on the purpose of monitoring - addressing variability in monitoring requirements to ensure data collection aligns with funders' goals, such as evaluating impact versus financial spending.

Collecting monitoring information can be time consuming. How do we support more efficient ways of doing it?

Alternatives to forms - exploring non-traditional monitoring methods, such as short films or other media, to capture evidence of outcomes.

Need to address need for clarity in impact assessment - developing frameworks to measure social impact more effectively, such as questionnaires or standardised metrics.

Leveraging feedback - using monitoring information to refine processes and improve future grant-making strategies

**Governance and organisational culture**

Board diversity and engagement - enhancing trustee recruitment to include diverse perspectives and ensuring a supportive rather than risk-averse culture.

Alignment with values - ensuring that governance practices align with how the organisation interacts with applicants, fostering trust and collaboration.

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| Stage (in order of activity) | Identified member good practice | Identified challenges |
| Governance & having the right policies in place | During Covid, Help for Health worked creatively with ERYC and HEY Smile. Used Help for Health as receiving org, ERYC provided short term funding and HEY Smile provided IT/grant masking back office.  Leeds Building Society Foundation have a dynamic and engaged board | Not having a diverse board  Trustee recruitment |
| Having the funds in place/donations |  |  |
| Timescales | Charity Bank – funds are fully subscribed and distributed quickly |  |
| Understanding need and focus for grantmaking | Prosper Wakefield – commissioned independent research on needs in Wakefield |  |
| Creating clear guidance | Leeds Building Society Foundation have a clear purpose which is translated into clear guidance. | Not having a clear criteria and policy |
| Grants management systems – processing and management of records of applications etc. | ERYC – have a successful grants management system which saves time in process grants. | GMS can be limiting – not easy to change  No application form  Application process is onerous on staff member, hard to manage trustee expectations and balance time & resources |
| Timelines | One funder has a rolling application process with no deadlines | Insufficient time to process grants  Timescales for decisions are variable |
| Due diligence | Help for Health – 2 trustees “triage” all applications first |  |
| Assessment | BRELMS – charity visits core part of assessment | Different grants can mean transparency isn’t always there |
| Promoting & raising awareness of grants | South Yorkshire CF worked with Community First | Applicant pool not diverse enough  Communications to applicants |
| Decision making process | One funder has lived experience panels and pays panel members | Lack of grassroots knowledge on grants panel. |
| Record keeping |  |  |
| Giving feedback | SYCF – give funding advice and support so applicants have more success next time |  |
| Monitoring |  | No system for capturing and understanding monitoring information.  Monitoring forms not returned, too much detail required or not enough depending on size of grants, not completed correctly  Not using monitoring information to review impact of funder or making changes to process |
| Understanding and measuring impact | Charity Bank – social impact questionnaire | Not measuring impact |