

**Funding South West
The Regional Funding and Financing Hub**

**An Advisory Group of
creating:excellence
*the south west regeneration centre***

DEVELOPMENT PLAN

April 2005-March 2008

OUR VISION

Investing in thriving and sustainable communities in the South West

OUR MISSION

Enhancing delivery of funding and funding advice to communities and their economic partners so as to carry out regeneration, development and renewal in urban and rural communities

OUR VALUES

We believe that people and communities in the South West can be empowered to achieve their potential through sharing quality information, guidance and advice. We recognise, embrace and celebrate the diverse communities and groups that contribute to the region. We are committed to providing a forum in which all those who share our vision and values can work together

EXECUTIVE SUMMARY

Funding South West (FSW) is a new concept in the region developed by a group of funders, funding advisers and development workers in the South West in 2002¹.

Funding South West is an advisory group of *creating:excellence*, *The South West Regeneration Centre*. This is a wider initiative to help people in all sectors to cut through complexity in the field of regeneration and renewal and to engage in the sustainable communities agenda, so they can achieve more positive and effective solutions for local communities.

This Plan describes how Funding South West will continue to foster excellence in funding for community regeneration and renewal in the South West, through 'shared interest' links between the four parties in the 'funding relationship': -

- funders and policy makers
- funding advisers and development workers
- fund-seekers - community and voluntary groups
- communities

Funding South West will work on six action themes over the next three years: -

- Research and policy
- Improving the delivery of funding
- Improving the delivery of funding advice
- Bringing funders, funding advisers and development workers together to identify and share good practice
- Evaluation
- From grants to sustainable solutions

This Plan builds on the earlier three-year development plan for CERF, which was based on consultation with 80 organisations within the sector. This consultation has been built upon through workshops and focus groups in the South West looking at diverse funding issues.

¹ Originally called CERF (Creating Excellence in Regional Funding), based on the funding subgroup of the steering group for creating:excellence.

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The Funding South West concept

Funding South West's vision, shared with all involved in developing and supporting sustainable communities and community regeneration and development, is for thriving and sustainable communities in the region. Achievement of this vision relies on effective, high quality funding processes that deliver resources to the right people in the right places at the right times.

Funding South West aims to improve delivery of funding and funding advice to communities in the South West by: -

Sharing good practice in funding Providing a platform for funders and funding advice and development workers to develop good practice in funding by improving grant processes, making better grants or giving a better funding advice service to their members. Models of good practice will be explored and tailored for the South West through consultation and joint development work with regional funders, development workers, funding advisers and fund-seekers. Where examples of good practice exist nationally these will be shared and built upon, and where they do not, FSW will feed successful models it develops up to national level.

Information provision Providing a regional funding information portal to all those involved in providing services to their communities in the South West region. This portal will contain information on regional funding streams, availability of funding advice services and links to other useful websites.

The aim is not to replace existing relationships and activities, but to enable these to work better, to create new ones and to work towards more efficient use of the region's funding resources.

Fostered and supported by a wide range of interested parties, including the SW Regional Development Agency (SWRDA), Government Office for the SW (GOSW), the South West Forum, the lottery distributors, higher education institutions and others, the South West Regeneration Centre has grown from the Centre of Excellence idea advocated by Lord Rogers' Urban Task Force.² The Regeneration Centre is now linked nationally to the Academy for Sustainable Communities and is supporting this agenda. The Centre aims to strengthen and improve communities and neighbourhoods across the region by: -

- promoting learning and the development of skills in regeneration and renewal
- sharing and increasing knowledge and power
- making new links between professionals and communities.

² *Towards an Urban Renaissance*. Urban Task Force Report (1999)

2 THE NEED

Funding is complex, and it ought to be simple. People need resources to improve their circumstances. There are funders offering resources. In practice, the line between the two is seldom direct. Organisations are wasting valuable time and resources in seeking funding, completing application forms, reporting back to a multitude of funders each with their own reporting requirements. Some organisations and communities are not able to access the advice and information they need on funding and are not receiving their fair share of funding.

Up to four parties are usually involved in the funding relationship, each with different perspectives and needs: -

- Local communities** Those who need funds and resources to improve their circumstances but can seldom get them as individuals or informal groups. Some communities constantly 'miss out' on their fair share of funding.
- Fund-seekers** Those who are looking for resources for projects and services. They want good funding information and quick, effective, fair and transparent funding processes. They also do not want to be spending so much of their time in seeking funding and reporting back individually to a whole range of funders.
- Funding advisers³** Those who give best advice, tailored to each fund-seeker. They need prompt, up-to-date, clear, comprehensive, easily searchable funding information and strong, open relationships with funders. Unfortunately, funding advisers do not exist in all areas across the region and provision is patchy
- Funders and resource-providers⁴** Want to benefit people who face disadvantage, or to provide a strategic impetus toward regeneration and renewal and improving the lives of people in communities particularly where those communities are facing disadvantage or exclusion. They need: -
- Approaches from fund-seekers that match their particular criteria and interests
 - Intermediary agencies to widely distribute funding information and advise fund-seekers
 - proof that their support is making a difference
 - the ability to maintain current activities and services
 - to increase their knowledge about best practice in funding

³ Includes community development workers, voluntary sector support workers, fundraisers, fundraising advisers and business advisers

⁴ Resources include gifts in-kind, free advice and help, surplus materials, volunteer time, etc. as well as money

The South West is a mix of rural and urban areas and this brings its own problems. The Funding South West Advisory Group members know from experience, as funders and advisers, that a fundamental challenge is one of communication – between funders and each other, between funding advisers and each other, between funders and funding advisers, between all of them and the communities they seek to support and develop.

Funding South West believes that all four parties in the funding relationship stand to benefit from improved communications, greater mutual understanding and opportunities to develop more effective funding and advice-giving activities. As funders and funding advisers we are taking the lead to bring about these benefits, in consultation and partnership with fund-seekers and communities. We also believe in the strong relationship between development in communities and the delivery of appropriate funding. The next chapter explains how we will do it over the next three years building on what we have already achieved.

Background

The guiding principle of Funding South West since the concept was developed in 2002 is that all parties in the funding relationship – funders, funding advisers and development workers – need to engage in consultation, relationship-building, collaborative development planning, testing and evaluation. This distinguishes Funding South West from Funders Forums elsewhere in the country, and makes its development more complex.

Putting this guiding principle into action demands genuine and meaningful consultation between funding advice workers community development workers, fund seekers and funders to develop good practice that is in line with what the community wants and needs.

How Funding South West will work

Funding South West already has a strong core of funders, funding advice workers and development workers who have attended the advisory group meetings and the activities that that Funding South West has been involved in organising (see Appendix 1). The areas that Funding South West needs to be involved in over the next three years in pursuit of its objectives are as follows:

1. Research and Policy

Funding South West should actively seek funding to undertake research looking at improving funding practice, ensuring that it is operating from the best possible information base and that it is taking into account the views of those living and working in the South West. It should seek to influence policy makers and those involved in the allocation of funding to ensure their best possible use for the benefit of communities in the South West.

2. Improving the delivery of funding

- Promotion of Equity in funding

Certain communities in the region constantly 'miss out' on their fair share of funding for a variety of reasons. It is important that Funding South West highlights inequality in funding and aims to ensure best possible practice in reaching out to marginalized communities to improve the funding balance. This may include researching new ways of delivering funding or highlighting good practice within the funding field.

- Developing networks of funders

To enable funders to meet to develop and share good practice it is important that networks of funders are developed and supported. Learning opportunities and training can be developed and delivered through these networks.

- Promotion of appropriate evaluation

Funding South West as outlined above has a role in the development and promotion of appropriate evaluation as a means of learning from the past and informing the future.

- The continuing development of an accessible information source on funding and funding advice

The provision of an accessible information source on funding and funding advice is an essential element of the provision of a good funding service. This should build on what is already there and provide useful links to existing information. Where appropriate and possible within the resources available Funding South West will also seek to build its own information on funding resources within the region. It should also include good links to other useful sites and build on what these sites have to offer.

3. Improving the delivery of funding advice

- Promotion of Equity in funding advice

Certain communities in the region constantly miss out in the provision of funding advice. This has a knock on effect to their ability to access funding. It is important that Funding South West assists with the development of a model of funding advice that enables funding advice to reach all communities and to be delivered in a way that is accessible to all communities. This will also include the promotion of the training of funding advice workers to develop equity of skills within the field to ensure an equity of delivery.

- Developing networks of funding advice workers

To ensure the development of good practice in funding advice and the exchange of skills it is important to support the development of networks of funding advice workers in the region.

4. Bringing funders, funding advice workers and community development workers together to share and develop good practice

It is important for all to realise the close connection between the delivery of funding and work undertaken by both funding advice workers and community development workers. Some funding advice workers provide a signposting service, others offer a more in depth service assisting groups with governance issues, and development of services. The current separation that exists between community development and funding is unhelpful. All parties need to communicate and to work together if funding is to be used to its maximum potential and best possible practice is to be developed.

5. Evaluation

Evaluation is an important part of regeneration and renewal and part of the learning process for sustainable communities. As such it is also an important part of the funding process. Through the earlier work of Funding South West the importance of evaluation within the field of funding has become clear. What has also become clear through consultation at events is the need increase those individuals in the sector with appropriate evaluation skills.

The following are the main elements to evaluation that are important for funders and those seeking funding:

- Evaluation of funded projects

If funders and grant recipients are to be well informed about the best use of funding it is important for both parties to know and understand what funding allocated to date has achieved. Too little appropriate and useful evaluation of projects is undertaken, from which learning for future investment can be gleaned. There is a need for funders to provide the resources to enable certain projects to be evaluated and for the learning from these projects to be disseminated.

- Evaluation of funding Programmes

Funders struggle to find appropriate ways to evaluate overall what their funding streams have achieved. Many funders do not bother to properly evaluate one funding stream before moving on to another. It is important for funders to develop appropriate evaluation systems to enable them to look at what their funding has achieved and how this can be improved upon. This information can then be used to inform future funding streams.

- Evaluation of funding processes.

It is important for funders to evaluate and review their own funding processes through involvement of their grant applicants to ensure that their processes are clear and accessible.

- Evaluation of funding advice

Funding advice workers need to be able to demonstrate their worth. To do this an appropriate method of evaluating their effectiveness needs to be developed to demonstrate to their communities the value of funding advice. It is important to remember that funding advice is delivered at varying levels of support and through a variety of service providers. These include community development workers, development workers within both large and small agencies around specific service users, as well as specialist funding advice workers.

6. From grants to sustainable solutions

While many of its members are grant makers, Funding South West's vision goes beyond funding through grants to helping to build a voluntary sector which seeks to sustain itself through as broad a set of financial mechanisms as possible. It wants to see a lessening of dependency of grants. Grant makers can help with this by widening their offering to include loans and other forms of support, such as direct help with development; funding advisers can encourage fund seekers to consider social enterprise solutions to their needs. Funding South West needs to develop stronger links with the social enterprise sector.

4 Timetable 2005-2008

Over the next three years Funding South West will: -

Short term

- Improve communications and mutual learning opportunities between funders, funding advisers, development workers and fund-seekers by organising and supporting the development of networks and by assisting with staging events to bring people together to share skill and experience and to develop best practice.

Medium term

- Undertake small scale research looking at what makes funding and funding advice difficult to access and how this can be overcome.
- Test and establish models of good practice in funding and funding advice.
- Develop more effective information and communication processes between funders, funding advisers and fund-seekers.

Longer-term

- Establish the mechanism for a cross-sector, strategic approach to regional funding for sustainable communities, regeneration and renewal, involving statutory, commercial and charitable funders, LDAs and funding advisers and voluntary/community fund-seekers.
- Consult with all parties involved in funding and undertake activities as a result of this consultation which will help to achieve the vision of Funding South West.

1. Research and Policy

- Research to evidence good funding advice provision in region, to influence local authorities and other providers.

ACTION: Agreed and commissioned late 2005.

- Develop a model to prove the worth and value of funding advice

ACTION: Development of such a model to be commissioned.

- Research funding patterns in the region.

ACTION: Agree appropriate research topic with Funders via Funders Forum.

- Research funding available in the region.

ACTION: Update and develop database of regional Funders

2. Improving the delivery of funding

- Support the development of a Funders Forum.

ACTION: Seminar at strategic level to initiate Forum in February 2006. Further actions to follow from wishes of funders.

- Training for funders: write and develop a training programme for funders

ACTION: Training programme currently being written and due to be delivered by South West Foundation and CIB. Funded By ChangeUp.

- Learning from what works. Learning from case histories and evaluations.

ACTION: Identify case histories and put on website. Creating: Excellence to gather case histories/links and put on website in consultation with Funding South West Members.

3. Improving the delivery of funding advice

- Support the development of the Funding Advisers Network, 'George'.

ACTION: Steering group formed and promotion commenced Autumn 2005. Launch of network March/April 2006.

- Training for funding advice workers.

ACTION: Training developed by CIB Yorkshire delivered by WCIB 2005-6.

Funded by Home Office and creating:excellence. Now subject of a Big Lottery bid at national level with Yorkshire CIB.

- Information on funding advice workers.

ACTION: Build on existing database of funding advice workers, developing knowledge of level of advice given and making information available on the website.

4. Bringing everyone together to share good practice

- Ensure that funders and funding advisers share joint events and activities to enable partnership working.

ACTION: FSW to facilitate two events per year, and take follow-up action as required.

- Working with community development workers

ACTION: Work with the Community Development Network and the Federation of Community Development Learning to consider accessing funding to put on community development training for practitioners. Ensure partnership working between Community Development Network and George.

- Working with other relevant networks

ACTION: Building links with networks and activities in other relevant areas, such as the cultural sector, where these enable joint working on issues of common interest in funding.

- Sharing information.

ACTION: Provide links on the website to useful information sites covering all issues concerned with funding.

5. Evaluation

- Evaluation for funded organisations. Build on the Demonstrating Your Worth Model to enable small voluntary and community organisations to be able to undertake their own evaluation. The model would consist of Initial assistance for organisations in designing the evaluation. Sample cost of each evaluation around £1,000. Organisations then to undertake the interviews etc. themselves.

ACTION: Model to be written up from the Demonstrating Your Worth programme.

- Training in Evaluation. Develop an accredited training programme in evaluation. FSW to work with an organisation that is experienced in evaluation and/or writing of accredited courses to develop an accredited course.

6. From grants to sustainable solutions

- Develop links between grant funders and those promoting more sustainable solutions, including social enterprise, and promote these through funding advisers.

ACTION: Work with Finance Hub of ChangeUp initiative, and develop regional profile of Finance Hub.

A Brief History of Funding South West

November 2001	Following on from a scoping study undertaken by Professor Murray Stewart of the University of the West of England, a group of funders and those involved in funding advice set up a Working Group to look at developing a funding resource model to link in with the South West Regeneration Centre
Feb-August 2002	The Working Group developed the CERF (now Funding South West) concept which was adopted by the South West Regeneration Centre as one of its four development themes
November 2002	Consultation Event organised by the Working Group to discuss the CERF concept with key stakeholders: development workers, funding advisers and funders. 80 delegates approved the concept and contributed ideas for its development – many volunteered to help it get going
Dec 2002-March 2003	Development plan created for CERF – implementation to start in Spring 2003
March 2004-August 2004	Research was undertaken mapping funders and funding advice workers across the region. <u>Mapping Funding Advice Services in the South West</u> , a report by Red Door Associates, is available for download on the <i>creating:excellence</i> website.
June 2004	Hitting the Target...Missing the point. The need for appropriate evaluation. An event for funders and funding advice workers attended by over 100 participants (full report available www.southwestfoundation.org.uk) From this event attendees requested training in evaluation to be made available and for the profile of appropriate evaluation to be developed and raised.
September 2004	Knowing me....Knowing You. An event sharing knowledge of each other's roles for funders and funding advice workers took place just outside Taunton. Over 110 people attended. Requests followed for a fund to assist with the establishment of networks both at a sub-regional and regional level. Attendees also wanted the profile of funding advice to be raised, appropriate ways of evaluating the value of funding advice to be developed and training to be available for funding advice workers as a way of improving the delivery of funding advice.

December 2004	The Evaluation Trust starts to develop its plans to deliver training in participatory evaluation in Gloucestershire, Bournemouth and Poole under the Demonstrating your Worth programme funded by ODPM through creating:excellence
January 2005	Charities Information Bureau Wiltshire and Swindon starts the delivery of training for funding advice workers funded by the Office of the Deputy Prime Minister and creating:excellence
February 2005	Single entry point for FSW launched on the creating:excellence website. The beginnings of the new database (still being developed but available for use and user feedback www.creatingexcellence.org.uk)
July 2005	Worker in post – Head of Funding South West
September 2005	Steering Group formed for George (regional funding advisers forum)
December 2005	Further research commissioned into effectiveness of funding advice provision in the South West

Members of the Funding South West Advisory Group

Andrew Middleton	Cornwall Community Foundation
Nigel Williams	SWRDA
Cath Stenson	Forest Of Dean District Council
Penny Bayer	South West Arts
Cathy Brown	SAVAGE
Chris Scally	Dorset County Council
Elisabeth Roberts	North Somerset Council
Gina Voice	Somerset County Council
Jan Crawley (Joint Chair)	South West Foundation: Comic Relief
Jenny Sparks	CVS Regional Representative
John Hardy	Tarka Trust
Kate Osment	Devon County Council
Mark Cotton	The Big Lottery Fund
Graham Harris	Wiltshire County Council
Andy Youl	Regional Development Agency
Mike Symons	GOSW
Neil Parsley	Royal West of England School for the Deaf
Pamela Judge	Legal Services Commission
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Richard Slingsby	Wiltshire Charities Information Bureau,
Trevor Smale	Lloyds TSB Foundation
Rosemary Hopgood	Wiltshire Charities Information Bureau
Suzanne Owen	South Gloucestershire Council
Steve Keable (Joint Chair)	Devon County Council, Playlines Trust
Sue Rees	GOSW
David Hancock	Charity Bank
Derek Dodd	Bristol City Council
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Jen Wildblood	Wiltshire & Swindon Community Foundation
Jill Styring	GOSW
Jonathan Farnhill	Institute of Fundraisers
Robin Foster	Dorset County Council
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