
Funding Advice Services in the South West

Undertaken by Red Door Associates Ltd

This report reflects the views of Red Door Associates from information gathered in the course of their research. If organisations have additional views that they would like to feed in to Funding South West Would we would be pleased to hear those views. The report is just a starting place.

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August 2004

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The following were contacted, but not entered on database as they deemed it inappropriate.....	Error! Bookmark not defined.
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Appendix 3: Other Contacts	Error! Bookmark not defined.

1. Summary

This report is part of a bigger piece of research which sets out to create a new, regional on-line database of those who give funding advice to statutory, community and voluntary groups involved with regeneration, and to map funding advice services in the region. The report should be read with the caveat in mind that defining and delineating the term 'Funding Advice' is an ongoing process and that this research is only the start of something; by continuing the work, more detail will be added to the picture.

This summary gives a quick view of findings and recommendations.

In undertaking this report, we talked to 126 funding advice workers in the region, 49 (39%) in voluntary or community based organisations, 64 (51%) in local authorities and 13 (10%) in other types (e.g. co-operative development agencies).

As part of the findings of this report the following outlines the main issues:

We found only 13 full-time Funding Advice Workers in the region (10% of the whole), while 85% (107 people) were delivering funding advice as part of their work.

In terms of geography, Devon has the most workers based within its boundaries, closely followed by Somerset. Swindon, Torbay, BANES and Plymouth have the least.

The picture on delivering advice is slightly different, as some advice workers work in additional geographical locations to where they are based. The hotspots are clustered in Somerset; the notable cool spots are Tewksbury, Stroud, Bournemouth, Purbeck and East Dorset. Voluntary and informal groups are well supported; regeneration companies, co-ops and social enterprises have the least available support.

'Funding Advice' seems to be clearly divided into two distinct modes: a) information giving, and b) what we have called 'handholding' (more in-depth support). 52% of local authorities provide solely information services; whereas 71% of voluntary and community organisations provide 'handholding support', with just 22% providing solely an information service.

Part of this research was to ask people about their issues relating to funding advice work. The main concerns are:

- Lack of capacity, due to increasing demand and budget cuts. Those seeking funding advice in the future may get less of a service because some local authorities are cutting back their funding advice services, and others are cutting support grants to CVS and the like. This squeeze will leave funding advice a poor relation at a time when groups are demanding more of such expertise than ever before.
- The need for simplification of Funders' processes, with more 'collaboration' between Funders on forms and monitoring

- An underlying feeling that funding advice work is undervalued, and sometimes not understood; there is no standard way of measuring the effectiveness of work

There are sections outlining training issues and needs, good practice, networking and suggestions for Funders. A need is identified for clear signposting of 'Funding Advice' on websites and at switchboards.

Recommendations cover the following:

- The on-line database, including checking data annually; creating guidelines for use; publicising it widely.
- Strategies for supporting Funding Advice Workers, include: more resources, not less; create easy methods of evaluating work; use networks to share experience and information; pool funding information; review existing training and expand what's available; create methods to filter people who need 'handholding' vs. information.
- Suggestions for funders from FAWs – cut down bureaucracy; collaborate with each other on forms; don't insist on innovation in projects.
- Future work which focuses on where we found gaps.

2. Introduction and Background

This work was commissioned by Funding South West, a division of Creating:Excellence South West, through the Charities Information Bureau (Wiltshire). The purpose is to:

- Create a new, regional database of people who give funding advice to statutory, community and voluntary groups involved with regeneration
- Map funding advice services in the region
- Map the range of funding advice networks
- Map the type of funding advice services available

We were gathering 'hard' data but also the views of funding advisors themselves on a variety of topics. Part of the brief also asked for our overarching impressions from doing the research

It sits within the bigger vision of Funding South West, whose mission is to 'improve delivery of funding and funding advice to communities so they can carry out their plans for regeneration, development and renewal'. The information gathered also aims to inform Funding South West's policy work, find potential for networking advice workers in the region, identify problems they face and potentially find ways to develop communications between funders and funding advisors.

This final report is based on figures from the 27th July, shortly before the database was completed, and some data from recent records and updates is not included – however these gaps are not anticipated to make any great difference to the findings.

3. Methodology

Based on the initial brief, we decided on which organisations would be most likely to host people providing funding advice: community and voluntary infrastructure organisations, local authorities, development trusts, other support organisations (e.g. for BME groups, disability groups, social enterprises, co-operatives). We did not include organisations where advice was only given internally or where advice was only about their own source of funding e.g. LEADER+ programmes.

Initial contacts came from three main sources:

- Consultants' local knowledge of community and voluntary organisations (like CVS, RCCs) and other infrastructure organisations
- Web trawls - especially for local authorities and agencies
- Lists provided by contacts e.g. Chris Tew, CIB Hampshire, from courses run on funding advice
- Further contacts came from talking to people in the course of this project

We interviewed our contacts by telephone, using a prepared questionnaire designed to elicit two distinct sets of details:

1. Quantitative and hard data to go on the on-line database
2. Informal and qualitative data to give an impression of the state of funding advice work in the region.

(See Appendix 1: Questions for Advice Workers)

All the counties and unitaries that make up the SW region were divided so that each of three people could conduct interviews across specific, neighbouring areas. This helped to build contacts from one organisation to another. Interviews were carried out over a period of three months, beginning with local authorities.

Data was logged onto a 'private' on-line database, which would be used as the basis for the final online database. All people we contacted were given the option of checking their entry before it would be added to the final data and go live. Entries were emailed back and people asked to correct them or make any changes. This process is still finishing at the time of this report.

Our findings and analysis are made up of:

- part one: hard data (facts & figures)
- part two: qualitative data, including researchers' impressions
- part three: the new on-line database

4. Research Issues

What is an Advice Worker?

We asked all organisations whether they had someone who gave funding advice to community and voluntary groups. We explained to all those we interviewed that a new database was to be set up, and questioned them regarding the level of funding advice they currently give.

Although we tried to determine whether they were mainly signposting to funding information and relevant organisations, or were hand-holding groups through a whole process, we have no way of knowing whether the information they gave us is accurate. People's views on what constitutes 'funding advice' may differ, they may want to appear to do more than they actually do, or they may have no idea of what funding advice really involves.

Finding Advice Workers

This was frequently more difficult than we expected, with a much smaller number of people being in the role of advice worker than was anticipated. People would suggest we talk to someone else in other organisations, which was sometimes useful and sometimes not; we often found that people were no longer in post or didn't do the work. The importance of talking to people, rather than just sending round a questionnaire, is pointed up here.

Slow Start

At the same time as this work started, another piece of mapping work was taking place for South West Forum. To minimise duplication, we tried to co-ordinate with the other researchers. This had the effect of slowing down our initial contacts with voluntary and community sector infrastructure organisations and led to some delays. The outcome did not generate any additional feedback for this research, as had been hoped.

Inaccurate Data

Over 75% of those we have emailed entries back to for checking are returning with small changes to the basic data that we've analysed here. (For example they tell us that they work with different groups, across a wider/smaller area or provide different services). We believe that there are various reasons for this:

- First, we were asking people to put their work into categories which really required some reflection; thus we may not have got wholly accurate data from them initially since they may not have thought about their work in this way.
- Secondly, when people see it written down it is clearer; they can digest it properly, and so make changes.
- Thirdly there may be different views in the organisation about what is offered, or what they want to say is offered.
- Finally, there may be an element of "it really is going public, we'd better say we work with *all* categories"

Information gaps

We believe we have contacted the main organisations where there are advice workers. However information gaps have occurred when:

- We have not been able to contact or follow up some organisations due to missed calls, or because people were unavailable. See Appendix 2: *Contacts to Follow up*, for these organisations, which could be contacted at a later date.
- Some organisations did not want to be included, did not currently have funding advice workers, or just wanted to be kept informed. See Appendix 3: *Other Contacts*

'Double' entries

Some organisations are listed more than once on the database, because they have more than one worker who wanted to be listed – so that people can contact them direct. Other organisations are happy to have just one listing, with others named on the database as possible sources of advice. As we have been counting workers, not organisations, this accounts for some high data, particularly in Somerset.

Interrogating the Data

We collected much information about organisations, what they do, where they do it and what they think about funding advice in general. This report only contains a fraction of the possible analysis and is the part most relevant to the brief. The analysis is complex because of overlaps in where people work, changes to political boundaries etc. Our analysis therefore, creates a broad picture, generally using counties and unitary authorities rather than an analysis by district.

The main focus of the work was collecting the data for entry onto a web-based database, which was designed to be in a searchable format for online users. This has made it more difficult to analyse data for this report.

5. Findings part one: Hard data (facts and figures)

Table 1: Number and range of organisations hosting funding advice workers

Table 1 gives the number of funding advisors and what kinds of organisations they work in, contacted by 27th July 2004,

Voluntary or community based funding advisors	49	39%
Local authority	64	51%
Other	13	10%
TOTAL	126	

This range includes

- Local Authorities - Town, District, Borough, Unitary and County Councils
- Voluntary organisations – Councils for Voluntary Service, Rural Community Councils, Development Trusts, local Forums, and others
- Other – Co-operative development agencies, regeneration partnerships, agricultural advisory services

We did not find many organisations specifically providing advice to disability or BME groups, and a more targeted question could usefully be part of any future work.

Table 2a: Regional Coverage: Where workers are based by county / unitary authority (UA)

Workers can be based in one area and work in another; this gives a picture of where people are based.

<i>County/Unitary Authority</i>	<i>Number of workers</i>	<i>% of total</i>
Bath and North East Somerset (BANES)	5	4%
Former Avon (<i>including City of Bristol, North Somerset and South Gloucestershire</i>)	12	10%
Cornwall	13	10%
City of Plymouth UA	5	4%
Torbay UA	2	2%
Devon	25	20%
Bournemouth and Poole (<i>made up of the two Unitary Authorities</i>)	6	5%
Dorset	8	6%
Gloucestershire	12	10%
Somerset	20	16%
Swindon UA	3	2%
Wiltshire	15	11%

Devon has the most organisations based within its boundaries, with 20% of the total, closely followed by Somerset with 16% of the total. Swindon, Torbay, BANES and Plymouth have the least, from 2-4%.

Table 2b: Regional Coverage: Where advice services are available, by District/ UA

This table shows how many advice workers (AW) cover each district or unitary authority area, divided into the seven sub-regional areas; this gives a picture of where people work. The 'hotspots' are shown by high scores whilst the cool-spots by low scores.

		AW
Bristol,	Bath And NE Somerset UA	7
BANES & Former	City Of Bristol UA	9
	North Somerset UA	6
Avon	South Gloucestershire UA	5
Cornwall	Isles Of Scilly	6
	Caradon	8
	Carrick	7
	Kerrier	8
	North Cornwall	8
	Penwith	8
	Restormel	9
Devon,	City Of Plymouth UA	5
Plymouth	Torbay UA	5
and	East Devon	8
Torbay	Exeter	8
	Mid Devon	8
	North Devon	8
	South Hams	9
	Teignbridge	8
	Torrige	8
	West Devon	10
Dorset,	Bournemouth UA	4
Bournemouth	Poole UA	5
And	Christchurch	5
Poole	East Dorset	4
	North Dorset	5
	Purbeck	4
	West Dorset	5
	Weymouth And Portland	5

		AW
Gloucestershire	Cheltenham	5
	Cotswold	5
	Forest Of Dean	5
	Gloucester	6
	Stroud	4
	Tewksbury	3
Somerset	Mendip	12
	Sedgemoor	10
	South Somerset	14
	Taunton Deane	12
	West Somerset	13
Wiltshire and Swindon	Swindon UA	8
	Kennet	8
	North Wiltshire	10
	Salisbury	8
	West Wiltshire	9

The hotspots are clustered in Somerset, with 10-14 workers providing support in the Districts. The notable cool spots are Tewksbury, Stroud, Bournemouth, Purbeck and East Dorset, with only 3 or 4 workers covering these places.

(N.b. One organisation, the Legal Services Commission based in Bristol, provides support across all these places.)

Table 4: How many people give advice fulltime or as a part of their job

A simple count of all those we contacted shows how many people are in a 'whole' advice worker role and those who do it as part of their job. This does not show that some who do a part role' are also part-time workers, which cuts down their dedicated funding advice time.

Part role	107	85%
Fulltime Advice Worker	13	10%
Minor	6	5%

(The 6 listed as 'minor' were not giving enough advice for it to be considered part of their job, or were between posts, but they or their organisation still gave a small amount of support.)

The majority give funding advice as part of their role (85%) whilst only a few are whole time dedicated to the role (10%). Within those who are listed as part role the percentage varies from 5% to 80% of their time spent on work linked to funding advice.

Table 5: How many people give different types of advice from each area

This shows where the organisations are *based*, not necessarily where they *provide* services. Generally people are providing advice on their own patch but some also cover a wider area.

We asked people to list the kinds of support they gave, and broke that down into two broad categories, 'handholding' and 'information service'. Handholding means helping with things like project development, group development, business plans, writing funding bids and general developmental support. Information service means advice on funders, information sheets, database searches, signposting. Handholding often includes information service, but not the other way round.

	<i>Total number based in area</i>	% in areas doing role			% in areas giving type of support		
		Part Role	Whole role	Very Minor	% giving 'handholding' support	% giving only information service	Support not clearly defined
BANES	5	100	0	0	100	0	0
Former Avon (inc Bristol)	12	100	0	0	83	8	8
Cornwall	13	85	15	0	54	38	8
City of Plymouth	5	80	20	0	80	20	0
Torbay	2	100	0	0	50	50	0
Devon	25	84	12	4	48	48	4
Bournemouth and Poole	6	33	17	50	50	33	17
Dorset	8	75	13	13	63	38	0
Gloucestershire	12	83	17	0	67	33	0
Somerset	20	100	0	0	45	30	25
Swindon	3	67	33	0	67	0	33
Wiltshire	15	80	13	7	47	47	7

BANES, Former Avon, Torbay and Somerset have no people working as full-time advisors, whilst Swindon and Plymouth have 20-33%. These figures need to be looked at against the actual number working in the area, as Swindon and Plymouth both have a very low number of workers (3 and 5). Those with the highest total number of workers, Devon, Somerset and Wiltshire, have 12%, 0% and 13% respectively in a full-time role.

The areas with the highest percentage giving handholding support are BANES (100%), Former Avon (83%) and Plymouth. The lowest are Somerset (45%) and Wiltshire (47%). The areas with highest percentage giving information services only are Torbay (50%), Devon (48%), and Wiltshire (47%).

Table 6: Types of organisations and types of support given

Organisation type	Percentage giving handholding support	Percentage providing only information services	Percentage of 'undefined'
Local Authority	44%	52%	4%
Voluntary or community based	71%	22%	7%
Other	54%	31%	15%

Local authorities most often provide only information services, at 52%. However, voluntary and community organisations most often provide 'handholding support' at 71%, with just 22% providing only an information service.

Table 7: Who can use the services across the region

This table shows what percentage of organisations will support each of the listed categories.

	Voluntary or Community Group	Social Enterprise	Parish Council	Informal Group Or Network	Regeneration Company	Coops	Profit Making Orgs	Individuals
% will support	95	64	58	83	41	52	17	43
% don't support	3	9	26	4	20	16	65	31
% may support	2	27	16	12	39	32	18	26

('May support' means that the organisation may do under some circumstances, or hadn't been asked by someone from that category, so wasn't yet sure.)

Voluntary and informal groups are the best supported with 95% saying they will support, followed informal groups/networks. Those able to access the least support are profit making organisations and regeneration companies. The high number of 'may support' comments for social enterprise, regeneration companies and c-operatives is probably due to a lack of experience with these; many people we spoke said they hadn't dealt with these kinds of organisations.

6. Findings part two: Qualitative Data

a. Networks

We asked people about networks that people are part of, which help with their funding advice role. These are not all 'funding advice networks' but they are where support is given.

Local:

National:

- NACVS
- ACRE
- CIB

Regional:

- South West Forum
- SAVAGE
- SW Funders Forum
- Creating: Excellence
- Black South West

- Wiltshire and Swindon External Funding Network
- Gloucester Funders Group
- Local social enterprise network
- East Cornwall Regeneration Officers Network
- SOLVE
- Cornwall Community Regeneration Network
- Devon Funding Advice Network
- Bournemouth and Poole Funding Advice Group (BPF OG)
- Leader + (local groups)

Many responded that they wanted local support, not something they have to travel miles for, as limited time is always an issue for meetings. It can also help deal with local issues. Others wanted a 'bigger picture' and getting information from the right sources. Comments from some advisors: '*Dorset desperately needs a Funding Advice Forum, or one that they can join in another county.*' '*Somerset needs organising!*' '*BANES obviously needs something.*' One contact at West Dorset District Council asked, "Do you know if there is likely to be a Funding Advisers network that will include Dorset?"

Collaborative Working - Bidding Groups

We have only identified a few specific groups who work together to attract funding into an area. It seems that funding advisors, who were our main focus, are not always the people who are involved in pulling the funding in. To find out more about who does this, where they are, how they work together and what they apply for, would need some additional time.

We did talk to people who said they were part of these collaborative groups (in no specific order)

- Wiltshire and Swindon External Funding Network
- Gloucester Funders Group
- Key ham Funding Group (Plymouth)
- South West Forum
- Bournemouth and Poole Funding Opportunities Group

- Cornwall Community Regeneration Network
- West Cornwall Community Network
- Cornwall Enterprise

b. Issues raised by those contacted

We asked everyone an open question about what issues they face in their work. These headings and the bullet-point comments give a real flavour of what life as a funding advisor is like.

- ☐ ***Not enough time, money and other resources to do a good job.***
 - There is a lack of capacity – not enough advice workers to do the work
 - Being a part-time worker; would know more if did it everyday, fulltime
 - Takes so much time to wade through stuff – funders change things all the time
 - Being part time makes it very difficult. Need funding advice worker/ dev worker shared across the patch. Because we don't do it often it's like starting again each time we. But we can ask DEFAN or DACVS for help.
 - Serious gap in how much money local authority has to support communities.
 - More money and time needed for voluntary sector to deliver services
 - Rural areas demand enormous amount of £ to deliver quality service
- ☐ ***Getting the right information and then sharing it in useful ways***
 - People don't know where to go for advice
 - Trying to keep a handle on it; changes all the time
 - Can all info come from one place? There are too many overlaps
 - We need less, not more info and to act as filter for groups
- ☐ ***Networking with others, in and out of the local area***
 - Need network to know what others are doing (BANES)
 - Would like a 'joint voice' with the voluntary sector so we work together and people know who to contact
 - Need support to get over frustrations –talking with others (funding advisors) is good
 - Not everyone talks to everyone –need to know what's happening
 - Need for funding advisors forum to work together and lobby funders regarding gaps
 - Meeting funders is very useful
 - Travel distance need to be considered for network events
- ☐ ***Isolation. True both for those in rural areas but also for a person doing the funding advice role in a much bigger organisation, e.g. local authority***
 - Only two advice workers in our area – we are very isolated

- ❑ ***Funders' bureaucracy with issues like changing goalposts, too much paperwork and all funders having different systems.***

 - Funders should come together and have one generic application form with add-ons
 - Monitoring forms are all different
 - Multi-funded projects mean lots of monitoring and paperwork for groups; matching process too complicated
 - Application processes need to be transparent – especially social services

- ❑ ***Effective delivery of funding advice; two ends of the spectrum on what is effective***

 - Need to be able to point people to site that is comprehensive and useful e.g. CIB site
 - Databases are of limited use – match needs to be good
 - Too much bureaucracy with money coming into region
 - Need clarity from government on funding schemes and how they link
 - Current methods and internal database not good – would be happy to have something else
 - Key to unlocking money is still the business plan
 - Voluntary sector groups often need capacity building/lots of support
 - There were a number of comments about some current products not being helpful
 - Support some local authorities gives falls short of development needs of community and voluntary groups

- ❑ ***Not enough staff/ workers doing the job. Many people are stretched to capacity; there are quite a few organisations who did not want to be on the database for fear of getting more work than they can handle.***

 - Need more advisors because of all social enterprises springing up

- ❑ ***Funding advice is not seen as a valuable service. Part of that picture is about how work is evaluated and some said they did not know how effective their role was.***

 - How do we measure performance? He thinks it's very ad hoc - impact etc. Should help to retain posts if can prove worth.
 - Need method of quantifying work, as service in Bath can be different to Cornwall
 - There's a need to improve the quality of funding advice

- ❑ ***Communities and groups find it easier to access services that have been around for a while – people know about them and they are easier to find. They are also likely to carry more local knowledge and experienced staff, although this isn't always the case!***

 - Funding for the sustainability of infrastructure organisations is needed

- ❑ ***More need for funding advice because more groups surfacing***

 - Community planning is great but is raising expectations and resources are already stretched

- Trying to deal with MCTI opportunities is difficult -expectations raised and not lots of money in the end.
- Due to Community Strategy process, need for funding advice help will increase, more people are getting community groups together, and all need advice. DC will have to become more targeted, prioritise, on who they help, outcomes, possibly place restrictions on type of help offered
- ☐ **Funding for particular groups**
 - Finding funding for pre-schools and new build
- ☐ **Advice Workers need experience and support**
 - Have to deal with 'bad feelings' and local politics and know how to work through it.
 - We gave more help in the past and are accused of putting up barriers
 - Difficulties of dealing with groups – sometimes they just don't understand stuff
 - Needs step-by-step information on how to move through community organisations process
- ☐ **Voluntary sector and local authorities working together**
 - Partnership working is worth it for all, not just local authorities
 - People giving out SLAs need to try and make sure there is no duplication.

c. Good Practice Ideas and Suggestions

There were many comments about good practice and ideas to be shared. These have been amalgamated into the following areas.

For Advisors Work

- ☐ **Using and Building Local networks**
 - Holding quarterly forums e.g. in Cornwall – for information sharing by groups
 - Working together as part of a 'funding group' and working on together to pull in funding e.g. Keyham
 - Skills exchange days for groups – to hear good and bad experiences
 - Share funding knowledge e.g. those who'll support village halls
 - Sharing through local forum (Devon Association of CVS)
- ☐ **'Handholding' work with groups**
 - Help groups be ready for funding – should be cautious giving advice to those who don't have capacity
 - Groups need to be encouraged to think long-term, especially exit strategies
 - Peripatetic workers delivering advice across an area
 - Be realistic about what can be achieved with funding advisor posts - but it takes a long time from initial contact to 'letting go of hand' - groups can become dependent.

- Business plan before bidding and use as base document for forms
 - Go out and see the group in their setting – gives clearer picture
 - Evaluate your work as funding advisor –send out questionnaires
- ☐ **Information Services**
- Bookmark sites and build your own profiles
 - Have accessible computer space for public searches
 - Communication – newsletters and other info for groups/ between advisors; and within local authorities
 - Go out to communities, funder’s fairs, consultations etc
 - Comprehensive information sheets re all aspects of co-ops
 - Make sure that all information that goes into public domain is accurate
 - Lets share info sheets and not all do our own e.g. booklet/toolkit (from North Somerset)

For Funders

- Regeneration magazine’s visual pullout on national funders
- Funders need to put money at front-end because of cash-flow difficulties
- Funders responsibility is to support with exit strategy
- Develop ‘main’ funder, so matching is easier
- Develop simpler methods for organisations to access funds
- Stop demanding ‘innovative’ projects –keep funding existing projects that work well (waste of time, money, resources to keep re-inventing wheel)
- Don’t keep changing the goalposts for funding criteria

d. Training for Advice Workers

We asked about what training people wanted and what would help them with their work. Time and location are a big issue for many people:

- *Not enough time to do it!! Wish I had the time.*
- *Bristol and London too far, need it in Exeter or Plymouth(for Devon)*
- *Distance learning would be helpful.*

People find it hard to know if training is useful and of good quality.

- *But how do we know that it’s good training?’*

People want training with a local bias.

- *‘Especially local to Cornwall’.*
- *‘Would like more local; funding stuff.’*
- *Went to London-based training - a total waste of time, given by people who had no idea of funding advice.’*

Some would like accredited training and courses at a ‘higher level’ for those who have been doing the work for some time.

- *‘Something accredited and designed for people already doing the work’.*
- *‘Needs to be accredited to keep quality same across sector’.*

Quite a few have done the OCN training and are happy with it; however the cost of training is an issue, especially for smaller organisations.

- *'Needs to be cheaper!'*

General topics asked for

- Best techniques for preparing bids including partnership working, complex bids, funding strategies
- Funding Sources: Awareness of funding wider sources than local area; accessing obscure funds; up dating of current trends and new funding opportunities; How to get business support for local groups, how to approach, what angle to take etc
- Working with community and voluntary groups: Community Development, developing constitutions, best practice; facilitating a funding advice session where each of 12 people has a different need/agenda
- How to get the information over, especially to those not 'up' on grants and grant systems; recognising need for other information (developmental needs),
- Specific funders events e.g. lottery
- Planning, strategies and management
- Project Management; business planning, if community group has a plan - how to turn it into a strategy
- How to use Funder Finder efficiently
- Policies especially H&S, child protection
- Financial management

Higher level training

- Training in regeneration issues, especially and Higher Ed/ University level
- Professional qualification of some kind; Maybe join Institute of Fundraisers
- Did CIB training in Bristol, but there could be part II

e. Researchers Comments

Snapshot view about regional coverage

Bath and North East Somerset and the Former Avon – BANES area in a little disarray and was hard to get information. N Somerset was well covered and agencies seem to communicate with each other. S Gloucestershire is a mix of rural and urban, somewhat sparse advice service but good signposting.

Bristol City - seems well covered, mostly through City Council or through VOSCUR but this does not seem to reflect a true picture.

Cornwall – has plethora of organisations partly because of Objective One. This is currently in a state of flux, as some get absorbed into Local authorities

and priorities are already changing – e.g. two Cornwall organisations we contacted, have changed their name and funder since we rang them.

City of Plymouth UA – not that well covered, but small area groups seem to be starting to deliver services.

Torbay UA - the CVS have just lost the funding for their one advisor and are waiting to see what needs arise in the area. We have heard that the Council has now appointed a funding advice worker.

Devon - Devon has a history of giving funding advice through Funding Advice Project and the CVS/CCD route. As those projects have ended, much capacity is no longer there and organisations are stretched because of the well-developed demand. Very strong funding advisors network (DEFAN), made up Local Authority and voluntary/community bodies. Funding and advice are thin on the ground in Exeter.

Bournemouth and Poole – no proper structure in Poole but we have heard that Poole Council have just allocated money to funding advice provision.

Dorset - seems hard pushed, with fairly weak infrastructure, and more demands coming from community planning processes.

Gloucestershire - well covered both statutory and voluntary. Information seemed relatively easy to get from most agencies.

Somerset – seems to be experiencing an explosion of workers, particularly South Somerset DC but doesn't seem well co-ordinated. There is also evidence of lack of infrastructure support in Somerset.

Swindon UA

Wiltshire most seems to signpost to the Charities Information Bureau (Wiltshire) and take part in the External Funding Network.

A number of local authorities have developed, or are developing, Service Level Agreements with local CVS, so they deliver funding and project development advice in a co-ordinated manner. A good example is Mid Devon, where the local authority Officer gives funding advice and passes projects over to the CVS for developmental support.

Information and Websites

There was great support for the concept of a regional database of funding opportunities that could be accessed by funding advice workers.

We found that switchboards of many district councils were unable to put us through to someone who gave advice on funding. We knew enough to ask for a community development officer, or the economic development department, but someone from the community may not. One advice worker rang her own switchboard pretending she was someone from the community and asked for advice on funding; reception didn't know anyone who gave funding advice in the local authority.

Some bigger organisations (especially Local Authorities) have many people giving funding advice and don't always know who does what, which means it can be difficult for people to access the right person.

Some local authority and organisational websites are excellent and link in to good information, others the opposite. Also, using the general search facility on council websites to look for Funding Advice, or Funding was mostly useless.

Need for Funding Advisors

According to the advice workers in this study, community groups are surfacing and needing funding advice 'like never before'. This is due partly to the community planning process. At the same time, local authorities are being asked to cut budgets, and there appears to be no extra funds to provide services for groups needing advice.

Some voluntary organisations who have had dedicated funding advice workers in the past said 'we don't really do funding advice anymore', because they no longer have the resources for one post just giving funding advice. Some local authorities who were 'handholding' to many groups are now having to target their resources and help just a few.

While in some areas provision of funding advice is improving, there are still a number of areas that are not covered.

Different views on what makes good funding advice

We found that 'Funding Advice' seems to be clearly divided into two distinct modes: information giving (advice on funders, information sheets, database searches, signposting), and what we have called 'handholding' (project development, group development, business plans, writing funding bids and general developmental support) and there may be other distinctions to be made.

52% of local authorities provide solely information services; whereas 71% of voluntary and community organisations provide 'handholding support', with just 22% providing solely an information service.

There is not an implicit judgement here that handholding is better than providing information services, but from our conversations we formed the view that they are *different* roles. Local authorities are often doing their best at providing information, but the opinion of many funding advice workers, particularly (but not only) in the voluntary and community sector, is that they often give information whilst thinking they are doing all they need to support groups on funding issues.

This research has pointed up the need for a clear set of parameters around the term "Funding Advice Worker", and further research could, by a process of triangulation, determine what people think they do, what other people think they do, and what those who use the service actually see them doing.

The bigger view from people's comments is that funding advice is part of growing a group from its conception into exit strategy, not just handing them a list of possible funding sources.

With this in mind, and to ensure that limited resources are used effectively, we suggest that it would be useful to 'sort' the groups that need handholding support from those who already have some experience and just need to identify funding sources.

Funding Advice Worker's issues

Part of our research was to ask people about their issues relating to funding advice work.

- The most common theme is lack of capacity, because of increasing demand, an inability to meet the demand, and budget cuts. From CVSs to district councils it was the same story across the board: trying to keep up with ever more funding information, dealing with changing priorities & criteria from funders, and not enough time to work properly with groups.

Some local authorities are cutting down the extent of their funding advice services, and others are cutting support grants to CVS and the like. This squeeze will leave funding advice a poor relation at a time when groups are demanding more of such expertise than ever before, and some suggested that those seeking funding advice in the future may get less and less service.

- The need for simplification of Funders' processes was a further key point, and perhaps a worker/Funder consultation might be useful.

The amount of information, the speed at which it is coming in, and the time it takes to sift through, were also common concerns. There were many calls for one key point for all funding information to come through.

Many people suggested that Funders could simplify their application processes, eg by having a generic application form with add-ons, or by having one key funder where matching was required.

- An underlying theme was a general feeling that funding advice work was undervalued, and sometimes not understood. Those we talked to who help groups through an entire process said there needed to be some recognition of the length of time, and the skill, it takes to progress a group from idea through to funding application and beyond.

However, if FAWs are to be seen as credible and valuable, they need some method of measuring and monitoring what they do in order to show how effective it is. Work could be done to develop methods appropriate for all workers across the region.

General comments

- Creating easy routes in for those in the community looking for support is essential, and easy routes for them to access funding is equally important. The Funding Advice Worker's role would also be made easier if these two points were addressed.

- Funding Advice Workers need to be, not just money-resourced, but time-resourced as well, if they are to carry out their job in any meaningful way.
- Much of the information we gathered is too complicated for detailed analysis under this brief, but our research could provide base-line data for further work, and might prove useful for workers and infrastructure organisations in the different counties to analyse further. This work represents only a starting point that should be added to by advice workers themselves.

7. The On-line Database

Updating and maintaining

The database will need annual checking and verifying, which will take time and resources. As the funding advice workers become familiar with the categories we've created in the database they will find it easier to answer the questions about what kinds of support they provide and to whom. We recommend:

- A full annual update of the database, emailing and telephoning contacts to check all on-screen data.
- Creating a facility for contacts to easily update their own information, which can be checked by South West Funding before it goes live; within a week minimum
- Providing an on-line space for users (e.g. community groups) and advice workers to provide feedback on the good/bad points of the database
- Explain what some fields on the database mean, so that accurate data is input; especially about 'types of support'

They may need more guidance on what is meant by each field and certainly people who are using it will need access to guidance about what categories mean (maybe through a 'help' button).

Publicising its existence

For the database to be used, people need to be aware that they can use the on-line database. Very early on, we had questions about how the local workers would know about the database. As most told us they get information via existing e-bulletins, using email would probably be the best way of letting advisors know when the site is ready and how it could be used. This could tie into launch events and make the information available to people who are constrained by time and travel issues. (Some people have said they want to be kept informed even though they are not on the database. See *Appendix 3: Other Contacts.*) We recommend:

- Publicising the launch of the on-line database to all those in this study via email, press releases and launch events

- To enable community and voluntary groups to use it, links need to be made to existing funding databases, both on-line and printed
- For it to be easy to use, guidelines need to be built around the website, including the what the difference is between 'handholding' and information services
- Signposting to other useful information, such as where the funders database can be accessed, should be included

8. Summary of recommendations

The following recommendations cover four areas:

- 1 The on-line database – set-up and management
- 2 Strategies for supporting Funding Advice Workers
- 3 Suggestions for funders from Advice workers
- 4 Other comments – future work

1 *The on-line database*

- Check data at least annually, using a phone call followed by email
- Provide guidelines and a Help facility on the database to make it user friendly
- Publicise the database to advice workers and local support organisations through email, print and identified networks
- Some people identified that they just wanted to be kept informed. They need to be told what is happening with the database and be kept in the picture.
- Publicise it in stages and monitor use
- Whoever sets up the final on-line database should link closely with CIB, Wiltshire and/or Red Door Associates

2 *Strategies for supporting Funding Advice Workers (FAWs)*

- **A growing sector.** Recognition required that the need and resources for funding advice is growing due to Community Planning, more social enterprises, more groups – more people flagged up the lack of capacity, the growing demand, and the inability to meet it, than any other issue.
- **One key contact.** Local authorities with advice workers/development workers should have a 'key contact' for people – often switchboards didn't know about the service or even denied it existed.
- **Easy web searches.** That all organisations with advice services have an easy link on their website to find the key contact, and have 'Funding Advice' on their search facility
- **Evaluate effectiveness.** Develop an evaluation method to measure the effectiveness of funding advice, bearing in mind the complexities of the role

- **Recognise the role of FAWs** as interface between the community, the voluntary sector, and Funders; Funders want to give funds appropriately; communities want to access funds; FAWs are the vital intermediary to lead the one to reach the other, and ensuring the efficient and effective delivery of everyone's objectives.
- **Training.** Gather information on the new website about existing training, under the topics listed here. Creating an easy to use review section, with a scoring system like those on amazon and ebay. Test out ideas for new training with FAW groups and pilot new training in some areas.
- **Using Networks.** Build on existing networks and help establish new ones where they are needed and wanted. Provide practical support (such as resources and administration) so that local groups can function in a way that serves their area best - talk to key people in the local network organisations. Need system/structure for feeding information up to government
- **Pooling information.** Many people are creating information sheets or local e-bulletins, whilst also having to sift through lots of new information. As a start a web-based list of who has what and what it does could be gathered, so that people could search and find what they need locally.
- Develop ways of filtering people who need handholding support vs. those who just need to find funders i.e. already have some experience

3 *Suggestions for Funders from Advice Workers*

Advice workers had some key points to make to funders:

- Less bureaucracy and paperwork
- For funders to collaborate with each other on application forms, monitoring/claim processes to make life simpler for projects
- Set up an advice worker – funder's consultation to agree issues that will help work to be more effective for both
- Don't insist on innovation; help successful organisations to sustain themselves, including those giving advice to others

4 *Other Comments – future work*

- Define levels of Funding Advice work, from signposting through to handholding.
- Build on this research by using a process of triangulation (finding out what people think they do, what other people think they do, and what those who use the service actually see them doing) to identify the true level of funding advice offered by organisations.

- We did not find many organisations specifically providing advice to disability or BME groups, a more targeted questioning to current advice workers would help add to the picture, as well as reaching organisations we were not able to contact.
- The links and difference between handholding and information giving are crucial to how support is given across the region. It would be useful to know trends over time and what factors affect the decision to give one form of support over another. Working with a simple system to evaluate effectiveness of advice and support, further work will begin to show if one is better or more important, or used at different times in the life-cycle of a group.
- Work with those in local authorities and bigger organisations to create easy routes in for groups looking for support. Many switchboard/reception staff had no idea of what funding advice might be. This also applies to websites; an easy way in that is obvious, please!

Appendix 1: Questions for Advice Workers

Contact details	
Name of person being talked with: confirm database details later)	Email contact (to
Funding advice contact to go on website Names/job title + contact details for web	
Name of employing org.	
Address	
Tel. Fax.	
Title of job	
Name of provider of this info if different frm (1) funding advice contact	
Website address	
Service details	
Type of AW: AW = only job is fund.advice; P = job includes giving fnd.adv.	
% of job that is funding advice or , approx no. of days p.a. the org. offers on funding advice	
Service funded by	
Charge for service, if any	
Potential end date of service	
Type of support given, to who, geog area covered	
<p>Type of support/advice/info provided & how – general description of service,</p> <ul style="list-style-type: none"> - Org has funding source books av for hire/to use on site - Provides researched lists of F's for particular types of projects - Computer prog to aid searching, for client's use – FF, GS - Will complete search, & send out details of results/funders - Runs regular (annual) course for accessing funding - 1:1 telephone adv/suppo with applications/finding funds - one-off meeting to discuss possible funding sources - one-off meeting to give advice on completing particular forms, or devising funding strategy# - offers longer term support role for ogs, supporting though process of identifying funders & completing applications - their <i>feelings on level of support/ quality of service</i>. Or do they just refer you on? Who do they not support? 	
Overall impression – is mainly info, or mainly hand-holding?	
Types of orgs eligible to use this service, eg charities, social enterprises, etc. Vol. Comm gp Soc.ent. PC Informal Gp/Ntwork RegnCo Coop Profit making org Ind Restrictions	
Geographical area covered (specifically – ie “whole of SW region” or “Tavistock only”	
Do they give £ to comm./vol for regen – have applic.process? Other depts (eg Arts Dept)	

The kind of support they get – specially isolation, their needs & issues
Are you currently involved in any funding networks. If so, which ones If not, would you like to be involved, and how
Where do you get your information from – eg email, discussion group ...
Who do you work with on an informal basis
What training do you feel you need
Any other issues related to your funding advice job
Any good practice ideas
Researcher's overall impressions
Any other people in your organisation/other depts giving funding advice we can talk to

Additional Q's to Public Sector Agencies (FOR south West Forum Research)
1.Name/ post title/ Agency
Concrete evidence
2.Level of grant aid: How much £ did you give vol/comm. sector in the last financial year
3. What kinds of infrastructure support do you give – under 4 headings - <i>(see H's list, q10 & 12 as for vol.orgs – find out as best you can)</i> does the authority provide directly to vol/com.grups, eg <i>training, funding advice, etc.</i> (eg, for us bus.planning, funding adv, help developing constitutions etc).
Qualitative evidence
4. An impression of the infrastructure re kinds of support in general from vol.gp to vol.gp.
5. Do the LA want to support vol/comm. in developing infras'ure, or are they ploughing own furrow re community planning.