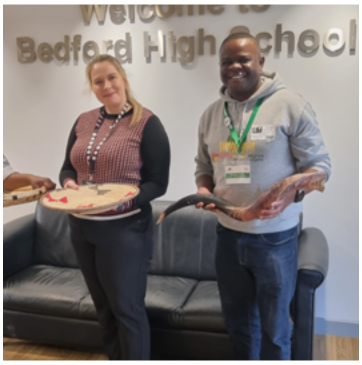
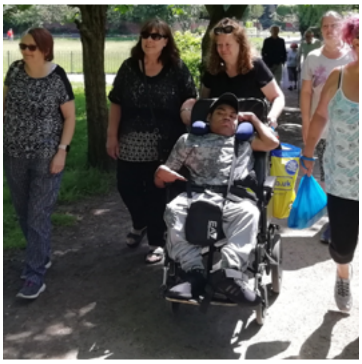
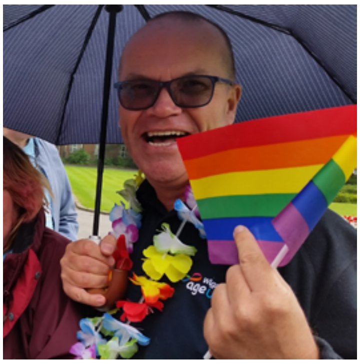
A Good Practice Guide to delivering inclusive Microfunding





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COMMUNITY FUND

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Contents

This guide is designed to support community workers and organisations to deliver a microfunding programme.

It is based on learning from Ambition for Ageing's seven year delivery of microfunding programmes across Greater Manchester. We hope that this guide will help when planning co-produced microfunding projects.

Background

Ambition for Ageing was a seven-year Greater Manchester-wide programme that aimed to reduce social isolation for people aged over 50, to create more age-friendly places, and to empower people to live fulfilling lives as they age. It was a partnership programme led by GMCVO and funded by the National Lottery Community Fund, as part of the Ageing Better Programme.

Ambition for Ageing used a microfunding approach to invest in community initiatives co-produced with older people.

They invested over **£2million** into over **1,500 small projects**, which intended to:

- Connect communities and older people across Greater Manchester
- Help to create age-friendly places
- Create the opportunity for people to contribute to the ageing agenda

Co-production, participation and empowerment were key to ensuring older people were involved in design and delivery. It was a test and learn programme, meaning they learnt from successes and challenges, and promoted and supported flexibility and responsiveness.

Supporting Ageing in Place was Ambition for Ageing's latest microfunding programme (2020 – 2022) which funded over 100 community projects worth up to £2,000 each, including to 64 grassroots organsiations, in 11 specific neighbourhoods across Greater Manchester. The aim was to make places more age-friendly and encourage older people to build social connections, especially those from marginalised and low-income communities. This report uses the approach taken by this programme as a basis for our recommendations.

Principles of Microfunding

The basic principles underlying this kind of microfunding approach were to:

→ **Target the approach to focus on areas of greatest need**
→ **Make small improvements at a local level, since this can be more effective than one broad 'top down' approach**
→ **Provide 'wrap around' support and capacity-building to applicants to enable them to be more sustainable.**

With the right environment and support to provide guidance, mediation, and oversight to community organisations, the changes offered by a small pot of money can have a significant impact.

Supporting local people means supporting their community organisations and investing in the places where they live. Place-based working needs to be complemented by programmes of work that target those whose social lives are not locally focused. Find out more in our report, 'It's About People, not Place'.

Resources

Other Ageing Better partnerships produced resources around delivering microfunding. Click the links below to read more.

- **Small Funds: Setting up a Microfunding Programme**, Time to Shine Leeds, in partnerships with Leeds Community Foundation.
- **Sowing the Seeds: Reflections on running a small funds programme**, Time to Shine Leeds
- **Microfunding to Enable Digital Inclusion,** Ageing Better in Birmingham
- **Evaluation of the Bristol Ageing Better Community Kick-Start Fund**, Bristol Ageing Better
- **"Before this, I had nothing": A Report on the Development and Impact of a BAME-Led Partnership for Tackling Social Isolation Among Older People in Camden**, Ageing Better in Camden
- **Working with minorities communities in Camden: The Ageing Better in Camden approach**, Ageing Better in Camden
- **Micro-funding: Empowering communities to create grassroots change**, The National Lottery Community Fund

Section 1: Application Process

The Process

We suggest that two years is the ideal timeframe for the whole process of opening the funding window, to completing project delivery and any follow-up. There should be apt time within the process for engagement, delivery and co-production (both to design and deliver projects).

→ **Option 1: Specific funding deadlines**

If you plan to incorporate a co-production approach where community members will be attending assessment panels, you should consider funding rounds with specific deadlines so they can pre-attend arranged panels for specific dates after each funding deadline has passed.

We feel this is the more equitable option since organisations and groups have the same chance of receiving funding in a set period, unlike an open round where funds diminish over time.

This option also allows for a more targeted approach if an initial round doesn't attract a diverse range of applicants.

→ **Option 2: Open funding rounds**

This option allows more flexibility for groups to apply for funding as and when they are ready, potentially allowing for more development time for bids from smaller groups.

Application and Submission

To assist with the submission of applications, you could provide a step-by-step guide to the completion of forms, video demonstrations, screen shots of the process, training, and linking in with other organisations who offer technical support.

Submission options could include a form (paper or online), video, or face-to-face where applicants can present their ideas in-person or during an online meeting. A personal touch and being flexible here is important since those working on and submitting bids are often volunteers.

Eligibility and Due Diligence

It is important to not create barriers with your due diligence process. Necessary due diligence should be proportional to the amount of funding on offer.

You might find that small groups are unconstituted or do not hold the correct insurance. Requirement of these in your due diligence could create exclusions. For example, for a group to be constituted, they need a committee, a written constitution document and a bank account, and groups without these will struggle to pass eligibility checks. This could apply to residents living in a housing association complex, for example, that have applied for funders.

Ultimately, it is important that information and support is provided to make groups more aware of how to overcome these constraints, such as applying for appropriate insurance.

You could also consider supporting the group to link with a larger organisation who can then hold funds for them. This is particularly helpful if the group applying do not have their own bank account.

Information for Prospective Applicants

A guidance pack for potential applicants should be available and might include:

- The types of projects that you are willing or want to fund.
- The aim of the work and what you want to achieve.
- Your target areas (geographically).
- Your target community or group (for example, people aged 50+).
- The amount of funding available per application (it might be that applicants can make multiple applications).
- Registration links for potential applicant information sessions, if applicable.
- What support is available to develop and write their application, or with the application process.
- Eligibility information.

The guidance pack should be housed on the funding webpage, and ideally, physical versions should be available on request.

Jargon should be kept to a minimum. Consider using a glossary if you cannot avoid some jargon. Consider producing an 'easy read' version.

There should be at least one named contact on the funding webpage where potential applicants can get in touch with any questions.

We recommend hosting online or in-person information sessions for potential applicants to communicate the information. This can help to ensure that potential applicants are clear about the process and eligibility

Any questions raised should be added to a 'Frequently Asked Questions' page, so all potential applicants can view responses to common queries raised.

Useful documents:

- **Download our 'Proposal Guidance' documents to use as an example**
- **Download our Proposal form to use as an example**

Section 2: Wrap-around Support

Technical support

Technical support for applicants is an important way to make funding applications more inclusive. You could work with local infrastructure organisations to provide technical support – outsourcing is particularly helpful if you do not have the capacity to support in-house. If you are looking to commission projects for local older people, for example, you could consider local branches of Age UK, or your local Community and Voluntary Services organisation.

Smaller organisations or groups often miss out on funding because larger organisations have more experience of writing applications. Use of accessible language and capacity building opportunities are important to make the process of applying for your microfunding programme accessible.

It is important to ensure an equal distribution of funds across different organisations within your geographical remit, thus avoiding one organisation monopolising funding.

A sustainable approach would be to equip organisations with the necessary skills so that they can apply to different funders and increase long-term possibilities for funding.

Capacity-building workshops

You might want to run capacity-building workshops to introduce potential bidders and smaller organisations to skills such as writing an application, governance (including specialist advice on legal documentation and constitutions), networking, asset mapping, and financial management. Organisations may also require regular/further training on the topic of mental health to better meet communities needs.

Sessions should aim at being as informal and interactive as possible, offering a space for learning and networking.

Section 3: Assessment Panels

Panel members

If you are using a co-production approach, community members of your target community should be on assessment panels.

For example, between one and three older people sat on each of the ten panels for the Supporting Ageing in Place programme. At least two community members would be preferable to ensure perspectives are varied, and panel members should be from a range of backgrounds, particularly underrepresented groups. It was important for the Supporting Ageing in Place programme that panel members had a connection to the place in which we were funding. By having older people with lived experience attend the assessments panel, we were able to have a better in insight into the needs of the local community.

Local Authority staff that worked to support local older people made up the rest of the panel, along with three members of programme staff; one to chair the panel, one to capture decisions made and why, and a contracts officer to ensure panel scores were correctly recorded and that panel members stuck to the assessment criteria.

You will also need to collect a conflict of interest form from panel members.

Training for panel members

You should deliver a short training session for panel members so they know what to expect. This includes going through the panel process, and how to score and mark applications. You should aim to reassure panel members that their view is important in order to build their confidence. It is important to be on-hand to panel members and offer support where needed.

Ideally, compensate panel members with a payment to cover their time.

You should aim to share applications with panel members at least two weeks in advance so they have time to read and score applications.

Format

Ask panel members to mark each application according to the assessment criteria ahead of the panel. During panel, take each application one by one, and agree a consensus score for each question. This will give you a final score for each application. If you have limited funding, award the highest scoring bids.

Otherwise, a score under 2 for any question (on a scale of 1 – 5), or a fail (on a pass/fail question) should be an automatic fail for the application as a whole. They should be able to resubmit in a future round after receiving technical support, if this is an option.

Inclusiveness

Rather than rejecting an application that is promising, it is preferable to ask bidders to re-submit after support to improve their bid.

Try to judge applications on a case-by-case basis, meaning you take into consideration factors such as the size of the bidding organisation. For example, an application from a small group from a community who experience racial injustice that have English as a second language may not be as developed as a bid from a large Housing Association who often have dedicated bid-writing staff.

Feeding back

The turnaround between the feedback from panels and the contracts going out for successful bidders should ideally be no longer than 4 weeks. It is really important to communicate the final outcome of this process to panel members to ensure they feel their contribution was worthwhile and valuable.

Useful docments:

- Scoring sheet example
- Assessment criteria example

Section 4: Funding packs, contracts & making investment

Once the project application has been approved by the assessment panel, you should send letters to successful bidders with a contract agreement and funding pack. The funding pack will vary from programme to programme. Contracts for small pots of money (2,000k and below) should be more straightforward in terms of requirements for documentation.

The funding pack should support with delivery of work and include, for example, communications and branding guidance, or details of your monitoring requirements.

In regards to signing contracts, ideally you should provide the option of signing documents electronically, or printing, signing by hand and returning the forms via post.

Time between the feedback from panels and the contracts going out should be as short as possible to allow for maximum delivery time. For small organisations starting a new project with few resources, delays in receiving funding can be an additional burden.

Section 5: Induction

Hosting induction sessions for successful projects is a really useful way to provide information such as delivery and evaluation requirements. This is a more accessible way of sharing the information included in the funding pack. It also provides an opportunity for questions and discussion, as well as networking since project providers may be based locally and would benefit from making connections.

Sessions might also cover topics such as delivering accessible projects and being inclusive, co-production, creative thinking, digital connectivity, collecting useful case studies, or social prescribing. Breakout rooms could provide the opportunity for providers to discuss their delivery concerns, such as Covid-19 restrictions, risk assessment and safeguarding, timescales or co-production difficulties.

It is also a chance to breakdown the power dynamic between funding recipients and funders. This leads to better and increased communication, and providers will be more likely to ask for help or let you know when things are not going to plan, and encourages a more supportive relationship.

You could deliver these sessions online, via Zoom or Microsoft Teams, to help people attend without the need to travel. Hold multiple sessions at different times of day to increase attendance.

Section 6: Monitoring & case studies

Collecting data

If your funding has monitoring requirements, such as collecting demographics or case studies, these should be as simple as possible to ensure you are capturing what you need in a way that doesn't create too much additional work for project providers. Monitoring must be relevant and proportionate.

Note that quality case studies take skill, time and effort – think about what other ways providers could capture this – photographs, for example. Consider the rationale behind what you are collecting – is it absolutely necessary?

In your funding pack and induction, you should explain why monitoring is important. For example, you might be capturing demographic information to ensure that projects are being delivered in a way that reaches those most in need.

Consider how you collect data, and how you could make it accessible for project providers. Forms could be submitted electronically, such as via survey monkey, or physically via post.

Ultimately, monitoring requirements should not be a barrier to prevent groups/organisations applying, but it is useful to have some mechanism to evaluate the impact of the projects delivered.

Case studies

Emphasis of case studies should be on what can be achieved with small pots of money, and the specific experiences of running a project.

The test and learn principle should inform the writing up of the case studies; successes are just as important as what doesn't work.

Case studies help generate learning (who the project is reaching and gaps in participation); showcases the work and the impact of the project; highlights the impact small projects have on place; and can be used to influence future design.

Consider providing one-to-one support to develop and write case studies, if you have capacity. This could remove a barrier for groups who haven't done this before and who may struggle with it.

Download our case study template here.

Section 7: Delivery

Your role as a funder

It is important to be flexible as a funder. Project providers need more flexibility when delivering so they can have autonomy to channel funds where there is immediate need.

Time for co-production and organisation is key for successful delivery, so ensure plenty of time is built in for delivery, especially if you expect project providers to involve community members in the delivery of their projects – co-production takes time. External factors, such as the Covid-19 pandemic, could have massive repercussions for delivery for these kinds of projects, so be prepared and flexible to accommodate any changes that need to be made. Individual circumstances with project providers, such as illness, could also impact delivery, so be prepared to be flexible since delivery might depend on a single volunteer.

Issues that may arise during delivery that you might want to offer support with:

- A lack of confidence in running projects.
- Issues specific to the local area or particular context, for example running a project in a housing scheme.
- Difficulties with recruiting participants or low levels of attendance.
- Difficulties diversifying and reaching out to different groups in the community.

Encourage project providers to be creative when engaging with potential participants in their community. It is also important to think strategically and plan ahead to manage demand. Also consider supporting project providers by promoting their events and activities through your own channels.

Keeping in touch during delivery

Since you built up a good relationship with project providers earlier in the process, communication should be relatively smooth. Ideally, project providers will get in touch with you if they come across any issues with delivery so you can deal with this on a case-by-case basis.

Ensure your contact with providers is proportional to the amount of funding awarded. Light-touch commination will suffice, such as one phone call every quarter.

If possible, you could build in time to visit funded projects to understand what is happening on the ground and provide more effective support.

Sustainability and The Future

Sustainability locally in the long-term depends on structural factors, such as spaces and networks of local organisations, and on strengthening community groups' resources and capacities, through regular support and training for skills and capacity development.

Microfunding programmes can help to increase social connectivity for local people, and help to develop the skills and resilience of participating groups and organisations. Sustaining these outcomes into the future involves thinking about a range of factors, including:

- **Availability, accessibility and affordability of social infrastructure** – enabling groups to provide opportunities for people to stay connected and develop new connections as they age.
- **Transport** – ensuring older people can participate in their wider community; ensuring members of geographically dispersed communities can gather together.
- **Inclusiveness** – considering the range of different cultural, language and material needs that people have when designing social policy, and community projects.
- **Capacity building support** – developing the knowledge and skills of small groups to apply for funding opportunities, or work in partnership with others.
- **Networking possibilities** – nurturing and facilitating opportunities for individuals and groups to develop their social capital through greater connectivity, increasing the potential for future new partnerships and mutual support.
- **Dissemination of information** – communicating to older people, and ensuring information can flow within and between communities.
- **Autonomy and flexibility** – respecting the knowledge and skills that groups and individuals have, and their capacity for involvement in designing and delivering social engagement projects.
- **Social prescribing** – connecting groups and projects to older people in need of opportunities for social engagement.