

Funding Information North East (FINE): Training for Funding Advisors

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Summary

FINE is a regional infrastructure support project to sub-regional and local funding advisers in the VCS and third sector. This evaluation focuses on the training programme delivered by FINE since 2006, which is funded by Capacitybuilders via the RIC, and includes the accredited and CPD training courses which link into Funding Advice Workers Network.

To conduct this evaluation, email questionnaires were sent to three stakeholder groups: funding advisors, key funders in the North East and RIC members. 13 funding advisors, 6 funders, and 20 RIC members completed and returned questionnaires.

The findings were generally positive for all of the stakeholder groups. For instance, funding advisers commented that the project had provided good quality training and support which had helped them to provide better support to the groups they work with, and had also given them the opportunity to do more networking.

Key recommendations for the project were developed at a review session. FINE stakeholders were asked to use the survey findings to assess the impact of the different aspects of the FINE training programme with reference to the resources devoted to each. Following the Change Check method, the recommendations were categorised as actions for now (within the next 6 months), soon (in the next 6–12 months) and later (12 months and beyond). These are shown below.

Now: in the next 6 months

FINE will contribute towards the RIC communication strategy which will work to improve the information and links between FINE and the RIC.

Soon: in 6 to 12 months time

Responses from this review will be fed into the RIC review and actions will drop down from that – some of the issues will be, hopefully, resolved by the RIC communications strategy as noted above.

Later: 12 months plus

FINE should explore the potential for joint working with funders to improve their mutual knowledge and to assess the possibility of increased funding for their work.

Overall the responses indicated that FINE is a well respected project that delivers quality training, information and networking opportunities regionally. There is scope to increase the services provided should the resources be available. Some development work on promoting the value of the FAWN across stakeholder groups is recommended.

1. Background

FINE is a regional infrastructure support project to sub-regional and local funding advisers based in the VCS as well as Third Sector organisations in general. It is a project of a consortium of Councils for Voluntary Service and managed and hosted by GVOC.

FINE provides good quality and up to date funding information to Third Sector infrastructure and frontline organisations as well as training to VCS Funding advisers across the region

FINE is a project of six regional Local Development Agencies or LDAs (Community Action Northumberland; Gateshead Voluntary Organisations Council; Newcastle Council for Voluntary Service; North Tyneside Voluntary Organisations Development Agency; South Tyneside Council for Voluntary Service; and Sunderland Centre for Voluntary Service). It covers County Durham, Northumberland, Tees Valley and Tyne & Wear. It is funded by a number of local grant-making trusts and also generates income from the services it provides.

FINE employs three full-time and one part-time staff (the Project Manager is Linda Whitfield). It has a Development Group (comprising the Directors of the six LDA's) which meets quarterly. It is based at John Haswell House, 8/9 Gladstone Terrace, Gateshead.

FINE researches potential sources of funding for the VCS in the region and the main roles of FINE are to:

- Maintain a database and information resources, circulating regular updates across the VCS in the North East;
- Supports and co-ordinates the Funding Advice Workers Network (FAWN);
- Provides an accredited and range of non accredited CPD training courses for funding advisors.

Funder Advisor training

This evaluation will focus on the training programme delivered by FINE, since 2006, this has been funded by Capacity builders via the RIC, and includes the accredited and CPD training courses, which link into Funding Advice Workers Network. There are 35 members involved in the network across the region.

The training is primarily aimed at VCS funding advisers based in local infrastructure organisations. This training is not for other staff in the VCS sector, as the FAWN participants 'cascade' the information and skills learnt from the training, to other VCS staff they work directly with.

FINE deliver its own level 3 accredited 'Giving Funding Advice' course in the region, one of only two available in England. Furthermore FINE has written a programme of Continuing Professional Development courses which extend the knowledge and skills of

funding advice workers around specific funding advice issues. The Giving Funding Advice is a 60 hour course accredited by Open College Network North East and delivered over six days by FINE's project manager, local funders and experienced funding advisers in the region.

The programme also includes training on new and emerging topics, keeping the programme up to date and reactive to needs of the VCS sector.

Existing monitoring information

FINE continuously carry out training impact evaluations with the funding advisors, to identify training needs. FINE have consistently evaluated the training courses previously ran. After each training session, the funding advisors are asked to complete an evaluation form, to give feedback on the training. This is to update the content and maintain accreditation with the Open College Network.

Furthermore FINE recently, between February and April 2008, carried out an Information Services survey with subscribers and purchasers, VCS and local authority funding advisers as well as funders (The North East Trust Secretaries Group).

2. Evaluation methods

1) Desk-based research

Key background documents relating to FINE and the training, provided by FINE were analysed.

2) Questionnaire surveys

A method of survey was used called ChangeCheck. The process uses surveys to get feedback on the impact of the work of the project. Three groups were identified to distributed surveys to, these were funding advisors, key funders in the North East and the RIC members. The surveys were distributed via email.

a. Funders' survey

The survey was sent to 20 funders in the North East, via the FINE office manager. The survey included questions on the funders' awareness of the FINE training and if the FINE training had improved any applications they receive. A total of 6 funders responded to the survey, making this a 25% response rate.

b. Funding Advisors' survey

The survey was sent to a total of 23 organisations with a total of 34 funding advisors who have accessed the FINE training courses. The survey included questions on the course they have attended; the benefits of the training to them and the VCS organisations they support; how the training information is transferred to VCS organisations; funding training needs; and the Funding Advisors Training Network. A total of 13 funding advisors responded to the survey.

c. RIC Members' survey

Questions relating to the FINE were added to an overall survey to RIC members on the RIC. Questions included awareness of FINE training; benefits of FINE training for their organisation and the VCS organisations they support; and transferring the information.

A total of 20 RIC members responded to the survey.

3) Change Check

Change Check is an approach to assessing the impact of community organisations which is endorsed by bassac and the Community Alliance. 3 groups of stakeholders were identified and sent questionnaires about the activities of the project, after carrying out an interview with the project lead to break down the resources used by the different parts of the project (i.e. standard working hours in a month) which were represented in graph form for the review session. Key stakeholders were invited to this session and the collated findings presented to them. They were then asked to rank the impact of each part of the project against the time committed to each, based on the information presented to them. Working from this visual record the participants in the session examined the various aspects of the work undertaken by the project and from this developed a number of action points/recommendations for the future.

3. Evaluation findings

RIC Members' survey

Awareness of FINE training

	Yes	No	Not sure	No Response	Total
Number of RIC members who have accessed the FINE training for funding advisors	15% (3)	55% (11)	-	30% (6)	100% (20)

Benefits of FINE training

To RIC members organisation

The FINE training has benefitted your organisation	Strongly agree	Agree	Neither agree/disagree	Disagree	Strongly disagree	No response	Total
	15% (3)	10% (2)	35% (7)	-	-	40% (8)	100% (20)

RIC members stated that the FINE training had benefitted their organisation in the following ways:

- Excellent sources of funding and advice
- Procurement event was useful
- It is essential that those who provide funding advice are trained and achieve a recognised standard to deliver a quality service. This has been a clear commitment from a number of LDA Chief Officers for some time.

To VCS organisations that the RIC members support

Benefits to VCS organisations you support	Strongly agree	Agree	Neither agree/disagree	Disagree	Strongly disagree	No response	Total
	20% (4)	25% (5)	30% (6)	-	-	25% (5)	100% (20)

RIC members' stated that the FINE training had benefitted the VCS organisations that they support in the following ways:

- Signpost them to local funding officers and funders from the FINE information
- In the current climate of funding uncertainty it is important that services such as this are supported, as they are often the difference between an organisation closing or not.
- By having a trained funding adviser VODA is confident that the service we offer to groups is of a good standard. This is further backed up by the ongoing support which FINE provides. This is an ongoing need as new people come into post.

Transferring information to VCS organisations

RIC members were asked to comment on how they transfer the information from the FINE training down to the VCS organisations that they support, the following

- One to one support and advice sessions
- Through their website, e-bulletin and VINE
- Through information provision.

Comments on the FINE project

'FINE is an excellent thing that should be continued as NE region is one of few that has this'

'Funding information is vital to us as we disseminate information through our weekly member emailing and quarterly newsletter.'

'Very impressed by FINE's work'

'FINE has been the regional infrastructure agency that has most consistently provided high quality meaningful support to a wide range of VCS organisations.'

'Fine is an essential provider of funding information and training for Funding Advisers in the region. It is an excellent example of how a regional infrastructure body supports the needs of local infrastructure providers.'

North East Funders

Awareness of FINE training

Awareness of FINE training for funding advisors	Yes	No	Not sure	Total responses
	83% (5)	-	17% (1)	100% (6)

Impact of FINE training

The funders were asked if they agreed/disagreed with the following statement to identify if the FINE training has had an impact on any of the areas (for the last two years):

Statements	Strongly agree	Agree	Neither agree/disagree	Disagree	Strongly disagree	Total
a. The general quality of funding applications has increased	-	40% (2)	60% (3)	-	-	100% (5)
b. The appropriateness of applications has increased	-	40% (2)	60% (3)	-	-	100% (5)
c. The number of applications has increased	-	40% (2)	40% (2)	20% (1)	-	100% (5)
d. There are gaps in funding applications	-	-	80% (4)	20% (1)	-	100% (5)

They were then asked if they thought the FINE training had improved any of the above:

FINE training delivered to funding advisors has helped to improve any of the above	Strongly agree	Agree	Neither agree/disagree	Disagree	Strongly disagree	Total
	20% (1)	20% (1)	60% (3)	-	-	100% (5)

Comments on FINE training

- *'Applications are more professional and give the information required...applications are better presented and save us time in evaluating projects and organisations which apply for grants'*
- *'I do know that FINE is highly regarded in the region and its demise would leave a large gap not filled by other agencies.'*
- *'As a centre of expertise and excellence FINE provides services at a regional level that could not sensibly be provided in every borough/county without duplication of resources.'*
- *'I think we would receive a lot more general enquiries if FINE did not exist'*
- *'FINE plays an important role in producing funding information and training to local funding advisors. Without this support work, we would receive more inappropriate appeals and phone calls.'*

Funding Advisors

Training courses attended

The funding advisors surveyed had attended the following FINE training courses:

- Business planning
- Capital fundraising
- Developing community/business partnerships
- European funding
- Exploring outcomes
- Full cost recovery
- Fund raising law
- Fund raising management
- Fund raising strategies
- Gearing up for change
- Giving funding advice
- Implementing the Charities Act 2006
- Introduction to fundraising law
- Legal structures
- Social enterprise: business planning and raising money
- Social enterprise and trading
- Tax effective giving
- Understanding the Charities accounting rules
- What is procurement

Benefits of FINE training

The funding advisors were asked if they felt the FINE training had benefitted them in some way, the following table outlines the responses:

The FINE training course has benefitted you as an advisor	Strongly agree	Agree	Neither agree/ disagree	Disagree	Strongly disagree	Total
	61% (8)	31% (4)	8% (1)	-	-	100% (13)

The funding advisors were asked to provide details the benefits. A number of benefits were given:

- Better support to the groups
 - 'Enabled me to meet the needs of each individual group I work with'*
 - 'Enabled me to deliver effective community development work for my organisations'*
- More informed
 - 'Excellent handouts and information provided by trainers'*
 - 'Expert input'*
 - 'FINE training is consistently informative and relevant to my role'*
 - 'Give me information about different funding resources. I learned about the requirements for good applications.'*

'Increased my skills and knowledge'

'Keeping up to date on current issues relevant to my role'

'More knowledge for giving funding advice and what funders fund want'

'My skills, knowledge, competence and confidence have significantly improved as a result of FINEs training.'

'Provides me with the latest information on developments within the VCS'

'Provided information to disseminate to groups I work with'

- Networking

'Discussion and reinforcement that you are doing a good job'

'Opportunity to network with colleagues and make links'

'Opportunity to discuss issues with colleagues and to find workable solutions'

- Support

'Gained support'

- Good quality training

'Good quality training delivered by experienced and knowledgeable trainers'

'Highlighting gaps in knowledge and areas where further training is needed'

'Training was geared at the right level and was attended just by advisors so questions and discussions were relevant'

Transferring information

A key aspect of the FINE training is 'cascading' the information the funding advisor have learnt, down to VCS organisations they support, the funding advisor was asked to expand on how they do this:

- Advice sessions/one to one support work with VCS organisations
- Assist clients regarding Charity commission information
- Assist groups to write better funding applications, where to apply for funding, project proposals and setting budgets.
- Disseminate information on current issues/funding information via bulletins, website, emails, newsletters to the VCS groups
- Information is disseminated and simplified to present to community groups on a daily basis
- Give advice and signpost where appropriate (to organisations/agencies)

Benefit to VCS organisations

The funding advisors were asked if they felt the training benefitted the VCS organisations that they support.

The training has benefitted VCS organisations I work with	Strongly agree	Agree	Neither agree/disagree	Disagree	Strongly disagree	Total
	61% (8)	31% (4)	8% (1)	-	-	100% (13)

Out of those who felt that it does benefit the groups they support, the following benefits were given:

- Being more prepared/more informed to give up to date funding advice/information to groups
- Contribute to completing funding applications
- Clearer ideas about what they need to do next to move the organisation forward
- Create a clear working plan to build their capacity enabling them to manage their projects and be more confident in themselves
- Understanding funding procedures in the UK
- Sources of expertise to refer to if problems arise
- *'Groups we work with have a good success rate with their applications'*
- Identifying training needs based on the requirement from funding resources

Feedback from VCS organisations

The funding advisors were asked if they receive any feedback from the VCS organisations they have advised on the support they have provided, the following responses were given:

- Achieving successful funding applications
- Excellent ratings in our annual survey of members, regularly receive thank you cards and letters.
- Improve skills/knowledge
- Good to be able to get advice on a number of different issues from one adviser, rather than seeking advice from a number of people
- Feedback on funding applications
- Positive feedback from groups has contributed to achievement of awards
- Positive feedback on the information we supply
- There is progress in every aspect of the group's engagement as community leaders from the comments they make, emails to activities etc.

Training needs

The funding advisors were asked to detail ad future training needs they had in relation to funding, that the FINE training could address.

	Yes	No	Not sure	Total
Any funding training needs that FINE could address in the future	54% (7)	-	46% (6)	100% (13)

The following training needs were identified by the survey:

- Any issue/recent development that may affect funding issues i.e. the new charitable incorporated organisations, new funding streams and requirements, new and changing legislation
- Charitable incorporated organisations
- Continuation of the FINE training which is reactive to latest needs
- Community interest companies
- Flexible up to date training for changing funding climate
- Social enterprise
- Training is ongoing and a key feature of FINE is they respond quickly to newly identified training needs

Funding Advisor Worker Network (FAWN) meetings

The funding advisors were asked to comment on the benefits of attending the FAWN meetings.

The Funding Advisor Worker Network (FAWN) meetings are a good opportunity to share good practice and network	Strongly agree	Agree	Neither agree/ disagree	Disagree	Strongly disagree	Total
	85% (11)	-	15% (2)	-	-	100% (13)

Benefits of attending the FAWN meetings:

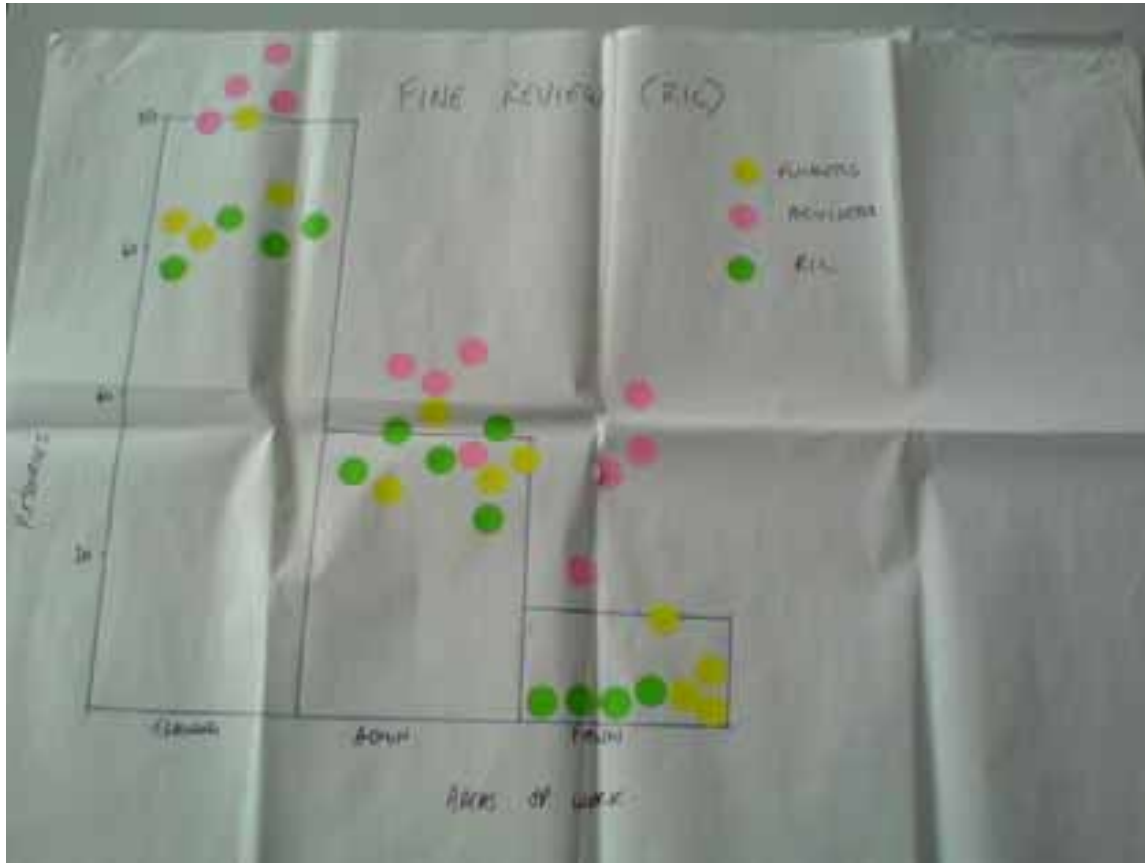
- Able to identify local trends and problems and work on solutions during FAWN meetings
- Being able to tap into a wealth of experience and share concerns.
- Can call the network at any time and seek advice
- Enable us to build up supportive relationships with others doing the same job in different areas
- FAWN meetings are very valuable to funding advisors
- FAWN is effective in helping funding advisors share practice and meet with funders
- Mutual support – sharing good practice and discussing funding issues keeps us all up to date and improves the funding advice in the North East
- The network is very helpful and gain lots of knowledge and up to date information

4. Change Check review process

Impact assessment

A review session was held which survey respondents attended; two FINE project staff and two funding advisors. The findings of the three surveys were presented to them in separately. They were then asked to comment on the impact of training; administration and FAWN, from the findings of these three groups.

Below shows the graph and the stickers measuring the impact of each area.



Training

This is the area of work funded by the RIC. The other areas are essential in supporting this work and ensuring it is relevant and responds to the needs of the funding advice workers.

The training came through with a major impact on the Funding Advisers and substantial impact on the funders who responded. It had a slightly lower impact on the RIC but was still substantial.

Admin

Admin is rarely perceived by external groups but because FINE provides information and training admin is essential to the processes. In general the comments indicated a real impact of the admin of this project amongst all the stakeholder groups – highest on the funding adviser, next the RIC and then funders.

Funding Advisors Workers Network (FAWN)

This had a very substantial impact on the funding advisers and much lower on the funders and RIC. Many funders use the network to consult with funding advisers about issues and their funding priorities. Maybe those funders who responded have not engaged with FAWN to such a great degree

Review session quotes

'FINE is an essential provider of funding information and training...It is an excellent example of how a regional infrastructure body supports the needs of local infrastructure providers.'

'FINE plays an important role in producing funding information and training to local funding advisers. Without this support work, the charitable trusts would receive more inappropriate appeals and phone calls.'

'Mutual support – sharing good practice and discussing funding issues keeps us all upto date and improves the funding advice in the North East.'

Summary of impact

Most impact

Training provision scores the highest across the stakeholder groups. For the funding advisers all 3 areas of work scored high compared to the resources involved.

Areas of impact to improve

As a second tier infrastructure organisation FINE is achieving a relatively high impact across the stakeholder groups. The main area identified in this assessment as requiring some work was with the RIC. In particular the RIC did not consider the FAWN very well. As the funding advisers are very positive about this it would be appropriate for FINE to consider information/promotion of FAWN within the RIC membership.

However please note that the RIC have been undergoing restructuring and have had a period of intense internal reflection. Steps are being taken to address some issues and a Communications strategy is being drafted. This report will feed into this in order to support the development of the RICs information infrastructure.

5. Action planning and recommendations

Now: in the next 6 months

FINE will contribute towards the RIC communication strategy which will work to improve the information and links between FINE and the RIC.

Soon: in 6 to 12 months time

Responses from this review will be fed into the RIC review and actions will drop down from that – some of the issues will be, hopefully, resolved by the RIC communications strategy as noted above.

Later: 12 months plus

FINE should explore the potential for joint working with funders to improve their mutual knowledge and to assess the possibility of increased funding for their work.

Comments from Linda Whitfield, FINE Manager

Advice

FINE's aim is to increase the effectiveness of the Third Sector in the North East through the provision of a comprehensive, central funding information service as well as a training and support programme for funding advisers to maintain and increase the quality of funding advice to the sector. It also aims to increase the understanding of funders on the issues affecting the VCS by convening a North East Funders Forum and acting as a conduit between funders and the VCS.

Funding proposal or idea

To employ a full time training officer to:

- To increase FINE's accredited and non accredited training and support to specialist as well as generic support organisations.
- To increase and develop the skills and knowledge of those workers to meet the needs of all sections of the community in the North East.
- Increase the quality of funding advice to frontline organisations working in or with excluded communities enabling them to build their capacity to effectively meet the needs of their respective communities.

Complementing this activity would be the employment of an information officer to support funding advisers and frontline organisations by researching and providing a central source of information about small tender opportunities relevant to the Third Sector as well as delivering training and support to funding advisers around procurement.