

Building Mutually Beneficial Relationships between Funders and Funded



In 2014 a group of 7 projects funded by the ALLIANCE Self Management IMPACT Fund came together with Fund staff to explore and share experiences of how funders and funded projects can build mutually beneficial relationships. The group met three times and was facilitated by Evaluation Support Scotland. Here are the top tips which emerged for organisations that want to make the most of their funding relationships.

Top Tips for Funded Organisations

Get to Know your Funder

- take time to **understand the funder behind the money** in order to make the most of your relationship with them *eg read their website and talk to other organisations you know that they have funded previously*
- be aware of **how significant your grant is** from the funder's perspective *eg what is a large grant to your organisation might be very small for the funder or vice versa*
- find out what **capacity the funder has** to support your project *eg a small trust may have no paid staff whereas a large funder will have dedicated funding officers*
- make **personal contact** with your funding officer (if there is one) – it's their job to support you so don't be intimidated and remember they are human too!

Stay in Touch

- view your funding relationship as an **equal partnership of mutual trust** where the funder has the money and you have the expertise – remember they want the grant to be a success as much as you do
- make sure the **right person** in your organisation has contact with the funder and share communications with each other *eg some support may be most appropriate for project workers and some might suit fundraisers better*
- if your **project's circumstances have changed** by the time you are awarded funding or the grant is due to start, get in touch with the funder to discuss this *eg if you have received other funds or your staffing levels have changed you could ask for the grant to be deferred or used slightly differently*
- **if in doubt, ask**, after checking the funder's website and other written information *eg is your proposed project eligible for the fund? what kind of project changes need advance approval and what kind can just be reported on in the usual way?*
- remember your funder will be open to **discussing project changes** if you can explain why they are needed – they are more interested in seeing planned outcomes achieved than in making you do exactly what you described in your application
- **communicate, communicate, communicate** - funders hate (unpleasant) surprises but will usually try to accommodate you if you forewarn them of potential problems *eg if your finance department is swamped, ask if you can submit the written report on time and the finances slightly later*

- **don't worry that funders are going to take money back** if your project changes or you don't get the reporting right at first – this is very rare and good communication at an early stage goes a long way to preventing it

Applications

- **set realistic goals for the time and money involved** – funders are more likely to be alarmed by a project with over-ambitious goals than one which expects less
- **include time and costs for good (self-)evaluation** – funders want to receive good quality reports and to be able to learn from your project
- if it is one of your funder's requirements, **build explicit time for working on building your sustainability into your application**

Reporting

- **find out what your funder's reporting requirements are** at the beginning of a grant so you can plan to gather the right information at the right time
- if you have more than one funder for the same project you may want to **explore whether they would accept the same report** (as per *Harmonising Reporting*)
- **have the confidence to explain the problem and change your processes** if you discover you haven't been collecting the right evaluation information
- **explain your project clearly in each report** – remember the reader won't necessarily be able to remember exactly who you work with and what you do *eg ask someone external to comment on your draft report before you submit it*
- **report on the right things at the right time** and spell this out – your first report may be mostly about setting up, later you will be able to report on your short- and then medium-term outcomes
- **remember that funders are people too** - they need to know the numbers involved but the human stories will make your project come alive *eg include photographs, images, scans of creative evaluation methods where possible*
- **be open about reporting on challenges and changes** so funders can learn for the future (they aren't asking because they don't trust you to do a good job) *eg make sure the report writer knows how and why changes have happened*
- **ask for feedback on your reports** if you don't receive it automatically – this will help you to provide the amount and type of information your funder wants in the future (see *What makes a good report?* for more guidance)

Extra Support

- **don't be afraid to ask about the full range of support your funder can offer** – some can help with recruitment, evaluation, communications etc
- **make sure you understand the potential benefits of any capacity building opportunities** your funder offers before deciding whether or not to take them up *eg ask for feedback from previous participants*
- **avoid reinventing the wheel** by asking your funder whether they can put you in contact with any other organisations doing similar work