

## **Building Mutually Beneficial Relationships between Funders and Funded**



One of the ALLIANCE Self Management IMPACT Fund's objectives is to build mutually beneficial relationships with funded projects so they are better able to transform the support and services available to people living with long term conditions. In 2014 the ALLIANCE invited seven funded organisations to join a learning set, facilitated by Evaluation Support Scotland, to find out whether they had communicated these objectives effectively and to learn how they could do this better in the future. Interestingly, many of the group's comments link closely with the Harmonising Reporting recommendations. This guide reflects the group's thoughts.

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## **Top Tips for Funders: in funded organisations' words...**

### **Communication is Key**

#### **In general:**

- please **avoid jargon** and explain any potentially ambiguous words *eg define what you mean by "sustainability"*
- we tend to take our cue for the kind of relationship you want to have with us from your **communication style** *eg chatty / formal...*
- we like it when funders **communicate with us in a variety of ways** to accommodate different learning styles *eg comprehensive written guidance notes, website videos (which could include previously funded projects describing their experiences), a series of e-mails, personal contact...*
- we are happy to help you **review your processes** by giving you feedback, whether or not our application has been successful

#### **More specifically:**

- you might consider offering **specific times** when we can contact you with questions – this would give us confidence that you expect us to get in touch
- to make sure your information reaches **the most appropriate person** in our organisation, please ask your contact to forward it as necessary *eg our fundraiser may write reports but our project worker may be the best person to attend information-sharing events*
- an **induction period** at the start of new grants (or just before) could allow you to drip-feed us useful information, get to know our project and build relationships between our key staff and yours
- please tell us about the kinds of **project changes** you expect us to consult you about in advance and which we can simply include in the next report – some real life examples can help us understand
- it is helpful if you are explicit about what levels of practical information, personal experience and financial data you want us to include in **reports** and whether this changes throughout the course of the grant *eg do you expect us to report on outcomes in the first report or only activities?*
- seeing some **example reports** could help us understand what you are looking for
- receiving **feedback on reports** can help us improve them in the future

- please tell us about **ways you might use evidence** which we include in our reports so we can make sure we obtain the correct permissions

## Calm our Concerns

- there is a tendency for us to view funders with awe so please **take the lead role in building our relationship**
- we often fear having money refused or reclaimed if our work doesn't go exactly to plan so please tell us about any potential **consequences of changes**
- explain why you want to know about **changes and challenges** in reports *eg after consulting us, The Self Management IMPACT Fund has devised the following wording: "We expect that projects won't go precisely according to plan. How could they? People are involved! We trust you to be the experts and know you will be able to think on your feet and handle changes well, but we would like to know what's changed and why so we can learn too."*

## be Conscious of Capacity

- we are relieved when funders have **realistic expectations** of us at the initial application stage *eg expecting extensive service user involvement in early project design is a big ask when our application might then be unsuccessful*
- sustainability planning, self-evaluation and capacity building activities all take time so it is a help when funders encourage us to **build time into project plans** for this
- be aware that our **circumstances may have changed** by the time a funding period starts – to get the most from your grant it may be worth checking this when making the offer or during the induction period and being flexible if possible *eg if we have received other funding or had staff changes*
- please tell us about **your capacity to respond to us** *eg do you have grants officers? is this a small or large grant from your perspective?*
- we are often nervous about turning down opportunities offered by funders in case it reflects badly on us so please **be sensitive to whether we have the capacity to have our capacity built** as we may also be receiving similar support from other funders
- we may need help to **understand the potential benefits** of the opportunities you are offering *eg you could share feedback from previous recipients*

## Create Chances

- we really like having the chance to **share resources** with other funded projects - especially if they provide similar services or work with the same client group *eg you could tell us about their work, convey requests for advice and materials and/or organise information exchange events*
- please keep telling us about the **full range of opportunities and support** you can offer and explain the potential benefits – we know that what's helpful may depend on our size and may change over time
- it would help us secure further funding if we received a **testimonial** at the end of our work with you to confirm we have successfully fulfilled the terms of your grant