Co-production in microfunding:

Resources for Funders

BRISTOL AGEING BETTER

COMMUNITY FUND

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AGEING BETTER IN BIRMINGHAM

1. Encouraging a diverse range of activities to be funded through micro-funding

Flexibility in the funding requirements

In order to fund a diverse range of activities, flexibility needs to be built into the core structure of a micro-funding scheme.

This flexibility takes many forms including:

-Do not require applicants to be a formally constituted organisation, have a formal policies or an organisation bank account. Instead, open applications to any individual, group of residents, community group or charity.

-Allow the funding to be used for services (e.g. venue hire, paid tutors, transport, training) as well as goods (e.g. equipment), or even a combination of both depending on the choice of the applicant. Many microfunding schemes tend to cover goods but not services.

-Allow the funding to be used to strengthen and diversify existing activities, rather than solely requiring new activities or group expansion; the funding can act as a 'travelator not just an escalator'.

-Give each applicant the choice of whether they would prefer the funding in the form of a financial grant or the direct purchase of goods/services of their behalf, and provide a step-by-step guide about how each option would work. Smaller groups may prefer items to be purchased on their behalf, leaving more time to focus on the activity itself, whereas larger groups may prefer a financial grant for accounting reasons.

-Have a small additional fund available, on a discretionary basis, to make up for minor oversights in an application's budget (e.g. additional costs they had not considered at the time of making the application).

-Allow the applicant to define the time-frame they want the funding to cover. Many microfunding schemes require the funding to be spent within 12 months; however some activities require a set-up time and may wish to spread the funding over 2 years, especially if this will improve their chances of being sustainable.

-Allow community groups and organisations to make joint applications, and be clear about whether this affects the amount of funding available to them.

Wide-reaching promotion and advertising

It is not enough for a funder to simply 'announce' a micro-funding scheme and expect people to apply. Instead, wide-reaching and proactive advertising is needed. In order to undertake this proactive advertising properly, a paid role is needed.

It is important to ensure that the languages used in the promotional and advertising materials and presentations match the needs of the local community and potential participants.

This may include:

-Adverts in local newspapers, magazines, radio, TV, social media, blogs, event guides and relevant mailing lists

-Flyers in community spaces and commercial venues

-Information workshops and/or pop-up stands at relevant locations (supermarkets, farmers' markets, community centres etc.)

-Promotion through community development networks, faith groups and other local social and support services

This advertising should make it clear that the fund is open to all, whether it particularly welcomes applications from certain groups and that support can be provided throughout the application process. If there are any restrictions to groups that have received funding already, make sure that these are clear.

After a suitable period of time, review whether any groups or activities are underrepresented in the applications so far.

-Have any geographical areas not yet submitted an application?

-Do applicants represent the diverse community you are active in?

-What types of activities do most applications focus on?

-How about applicants who speak English as a second language?

-How are applications spread between larger organisations, smaller organisations, existing community groups and individual local residents?

An accessible and supportive application process

In addition to widespread advertising, it is also important that the application process is accessible and supportive. Again, a paid role is needed in order to achieve this.

Make sure all the application paperwork (including the application form) is in an accessible format. This includes the size of text, colour of text, as well using straightforward language.

It is also important to provide applicants with support throughout the application process and to explicitly encourage them to make the most of this support.

This support includes:

-Having an accessible point of contact for queries, with the opportunity to discuss in-person, over the phone, email, video call and letter.

-Clearly explaining any restrictions in who can apply, with support to talk these through one-to-one if needed.

-If the language of the application advertisement is only in English then support should be available to those who have English as a second language, if they would like it.

-Consideration of the language used in the application and guidance, for example avoiding jargon and having translations available.

-Accept applications at any time of year. Arrange for a funding panel to review the applications on a regular basis (e.g. monthly or quarterly).

In addition to support from the funding organisation, applicants often require support from other sources too, particularly local community development workers or 'network enablers'. Residents may already be familiar with their community development worker or other local community worker and feel more comfortable asking them for support than the funding organisation, for example due to fears of this affecting their application.

It is therefore valuable for the funding organisation to build a strong relationship with local community workers and ensure they feel confident supporting residents with the application process.

Fair and transparent decisions

Applications should be assessed by a panel against clear, transparent scoring criteria which is the same for each application. This transparency is essential. Ensure applicants are aware of the scoring criteria in advance when writing their application so that they know what is expected of them.

However, even with transparent scoring criteria in place, some applicants may need additional support in understanding what the panel are looking for and what certain questions mean. For example, asking for 'future sustainability' plans may be extremely difficult for small community groups and individual applicants to answer without additional support.

The selection panel should have a majority, or at least representation, of participants from the same demographic group as the applicants: young for young; older for older etc. This may mean that the funding institution has a diverse group of panel members who are called on to assess applications in their specific category. When setting up the panel, consider what barriers panel members from the community may face and make sure it is an accessible opportunity.

It may be that higher scores are given to applications which target certain groups of people (e.g. communities considered at higher risk of loneliness). If this is the case then applicants should clearly explain **how** they plan to involve these groups, not simply mention that a high percentage live nearby.

It can be easy to feel positive about applications written by experienced bid writers, however it is important for the panel to reflect on their scores and hold each other to account so that equal consideration is given to those with little or no experience of writing applications and those where English is not the writer's first language.

When an application does not meet the criteria for success, provide the applicant with detailed feedback and support, encouraging them to reapply in the future once the necessary changes have been made.

Continuous process of review and improvement

It is important to keep looking for ways to make the application process more user-friendly and open to as many different people as possible.

One way of doing this is to talk to unsuccessful applicants to find out how they found the process and what was challenging for them, making changes in light of their feedback.

Even successful applicants may have some constructive comments on the application process as they will have gained confidence from their achievement and feel more confident to speak out.

As part of the learning process, the selection panel should actively arrange to individually visit a sample of successful projects and circulate their experiences within the group on an informal basis.

It may also be valuable to explicitly welcome applications from particular target groups, for example based on those who have been underrepresented in previous applications. These target groups could be reviewed on a regular basis and amended according to applications received.

2. How to ensure a co-produced micro-funding selection panel functions smoothly

How and when applications are shared with the panel

-The funding organisation should have a clear administrative process that follows each applicant from initial contact, through to them making the application, scoring by the panel and a final listing of whether the application was successful/unsuccessful (giving reasons). The panel should be able to access this overview and easily look back at why previous applications were successful or unsuccessful.

-Ensure the panel have enough time to look at the applications at home before submitting their scores and coming together for a final decision.

-Allow time for the panel to submit any clarification questions to the Project Officer to ask of individual applicants and gather responses before the panel meet.

-Provide the panel with information in their preferred format (e.g. via post, email).

-Strike the right balance between providing the panel with enough information to make their decision, while not overloading them with too much information (e.g. they do not need to see individual communication between the applicant and the funder).

-You may choose to have at least two of the panel plus representatives of the funder ‘to sign off’ the list of successful applicants after each selection meeting.

-Prepare a summary table for the panel with information such as the ward/neighbourhood of the city in which each activity will take place, the target number of beneficiaries, whether the activity is aimed at a target group (e.g. people from a particular ethnic or cultural background, people with dementia), and how much funding they are seeking, so that they can easily compare applications.

Scoring process

-It is important to have clear scoring criteria that remains consistent across all applications.

-Panel members scored each application individually at home, submitted these individual scores and then came together to collectively discuss and agree a final score for each application.

-The panel declared any conflicts of interest for each application. These should be declared as early as possible.

-Be conscious of potential bias created by the volunteers who happen to be on the selection panel, and encourage them to be conscious of this too in their discussions.

-Power sharing – the funding organisation also scored each application, but provided this last so that it would not influence the panel’s scores. On some occasions it was necessary for the funding organisation to provide the panel with some background information to help them make their decision. It is important to only have a certain level of influence from the funder; they have a vote and can provide relevant background information, while still not having too much influence over the decisions.

-It would be useful for the panel to regularly receive an overview of the activities funded so far (e.g. where they are located in the city, type of activity etc.)

Panel group dynamics and levels of motivation

-The administration of the overall process should be managed by a paid staff member who acts as a Coordinator but not the Chair of the panel.

-It is important to remember that the panel are volunteers – appreciate the time they are giving, give adequate deadlines and don't overload them. Ensure that volunteers and staff are valued equally.

-It is very likely that facilitation skills and a process for resolving differences could be needed if panel members disagree. However, initial disagreement often leads to the most productive discussion and decision-making.

-The chairing of the panel should be undertaken with an understanding of the experience, background and skills of the panel participants.

-It is motivating for the panel to be provided with information about how funded projects are doing. Offer opportunities for the panel to visit these activities/groups– this can be very motivating for both the panel member and the group themselves. If the panel are unable to visit the groups, encourage them to submit stories or case studies for the panel.

-Offer the panel opportunities to get further involved with activities in the funding organisation.

-Build time into panel meetings for informal social interaction (e.g. refreshment or lunch breaks) in order for the panel to bond as a team.