WM Funders Network
Assessing grant applications using an EDI lens
20th July 2022
Breakout Discussion Notes

Good practice in reaching out and encouraging applications:

- It's important to get and talk to people – to give a 'face' to the funder, and for professional development/keeping informed and in touch with community organisations e.g funding fairs, but also attending general community events

- An example the NLCF used recently was carrying out a face2face assessment with a group that didn't feel confident in their ability to apply online (unfortunately this can't do this for all A4A applications due to resource) but NLCF are looking at ways it can support groups differently in order to realise its EDI ambition.

- Proactive action from Lloyds TSB foundation to earmark 25% of funds to black and ethnic minority led groups only. Once funded conversation is much easier and allows further design of grant application systems and programmes. Nuances around how these orgs may differ can then be fed into the programme e.g black led and refugee led orgs may offer a more holistic support which is then more complicated to split into themed work e.g. mental health, housing.

- Meena, Locality is doing a similar thing with Together Fund with Sport England, a package of support alongside grant. The learning from the programme should be shared.

- Funders proactively approaching potential applicants is a positive thing. However, need to be mindful that it can provide to applicants an unintended tone and expectations. E.g. funder holds power, applicant can interpret approach as a sign they'll get funding, this can then cause more disappointment and harm to relationships if application is not successful. Also, funders approaching applicants are paid for their time. The applicants are not. Many funders have the same priority communities, which can lead to multiple approaches to groups that can be time-consuming and overwhelming.

- Taking a proactive approach can also have unintended consequence of appearing tokenistic. E.g. flurry of activity and contact towards a particular community during a set period of time, which then stops or changes when new funding priorities come into place. Are funders communicating strategies approaches, exit plans, etc to potential applicants to place their funding programme approach in context?

- is informed by data analysis (but not data-driven)

Good application process:

- Conversations (between funders & prospective applicants) are really important - they set the scene for the relationship and help both parties understand each others' position;

- having a clear idea of funding priorities - e.g. place-based v. thematic and communicating those accordingly;

- Helps to define what kind of relationship and contact is expected, proportional to amount available.

- Communication is key - both in terms of own communications (being clear about priorities, focus etc.) but also being connected to 'reach the unreachable' or help you to 'know what you don't know'

- Baron Davenport seek to fund everyone that approaches them with even just a small amount. The benefit of small grants is that can lead to open dialogue, pilot relationships and allow groups to build a track record.

- Need to be mindful of perception of language used. E.g. 'customer' can make applicant feel more autonomous and that they have choice. But could also give impression that they will get funding ("customer is always right", providing a service to meet the needs of the customer – in funding, the customer needs money).

- Encouraging applicants to be honest about what they *actually need* (in terms of funding) ... and being flexible/willing/able to increase/decrease awards as appropriate

- Proportionality - in terms of process related to amount sought.

Assessment process:

- One that is transparent - applicants clearly know the basis on which their applicant will be judged (not necessarily 'scored'), accepting that this can often be a subjective view taken by the Assessment Panel (particularly where it's about outcomes not activity)

- Discussions on risk aversion. Can you quantify how risk averse your panel/org is? How much £ per year would you be prepared to give with the lightest touch possible? How prepared is your org to earmark specific funds?

- Carla, BCC however can share a really good measure used by National Lottery Community Fund and other funders when looking at measuring the senior management of groups

Communicating Decisions:

- Meaningful feedback provided - that is 'personal' to the applicant, rather than just a generic statement.

Key cross cutting organisational considerations:

- Overall point reached is that these discussions permeate all roles within a fund and interrelate. Therefore, if planning strategies, policies etc. all staff need to be involved in some way and EDI will relate to everything the funder does.

- There will be many competing priorities of which the EDI lens is but one, so finding the appropriate balance;

- Funders are on individual journeys - some further along that journey than others. What's important is the desire to progress that journey and to understand that there (probably?) isn't a final destination - there will always be a need to iterate and re-iterate, being mindful of the external operational environment, and to flex/respond accordingly;

- For many funders it's a question of reviewing/updating/introducing policies and procedures.

- Ensuring diversity in a funders' workforce

- Need to dedicate time for EDI – it won't happen otherwise

- Tina, Sutton Coldfield Charitable Trust, shared the name of a person/org who trained their board around EDI and allyship and advocacy. Such training is absolutely essential for panel and board, and needs to be modern, proactive EDI work which includes issues around anti-racism, white supremacy, measurement, allyship and advocacy. Awareness isn't enough.

- Keep learning