



Building Relationships with Funders and Commissioners

Introduction:

Building good relationships with funders and commissioners is very important for getting access to funding and influencing policy decision-makers. It takes time and effort and may seem to be an unnecessary distraction from the core work of your organisation, but can be crucial for sustainability.

The information below provides useful tips on networking, and guidance for developing and maintaining relationships with funders and commissioners.

General tips for 'networking':

Why go to meetings and events?

- To publicise your work and build the reputation of your organisation
- To find out about: new developments in your area of work, funding, sources of support, new policies and strategies
- To influence policies, strategies and decisions affecting your work
- To meet people who can help your organisation with its work, or who you could do joint work with, or develop a partnership project

Staff and volunteers in women's organisations don't have the time or resources to go to every meeting, forum, training session or event - so it is essential to choose your meetings carefully and network as effectively as possible.

In many ways, networking in a work situation is similar to making contact with people in a social situation. Not everyone feels comfortable with networking; so think about who would be the best person to attend a particular meeting or event – they might be staff, volunteers, trustees or service users.

Here are a few tips for effective networking:

- Go to meetings and try to make sure you always speak. You could ask a question or make a point; always make sure you introduce yourself and your organisation when you do this
- Go to conferences, events and training sessions. Check the list of participants and try to speak to people who might influence or have a connection to your work.
- Offer to talk about your work at other people's events or meetings
- Check whether any of the people you already know could put you in touch with people you want to meet – ask them to introduce you or invite you to a meeting where you can meet each other

- Find out more about the people you want to meet – their interests, work, involvement with other organisations, networks etc. This can help you to engage them in conversation and focus on issues they are likely to be interested in
- Organise an open day or event – invite the people you want to meet and make sure you talk to them!
- Once you get to speak to someone you want to meet, tell them about your organisation clearly and concisely. If possible practice what you want to say before you meet with the person. It is important to engage them in conversation and listen to what they have to say
- Follow up brief (or longer) conversations with people at events by contacting them soon after – by phone preferably or by email
- Give people your contact details (business cards, leaflets etc.)
- Visit other projects, talk to people doing similar work to you – this might be an opportunity to find out about a key meeting, learn about a new source of funding or plan to jointly influence someone
- Present your organisation or your case positively

Presenting your case: what is special about your organisation?

Think about your 'unique selling points':

- The extent or urgency of the problem or need
[This is very important; funders want to see strong evidence of need.]
- The emotional appeal of your work
[What you're doing is important and it's ok to feel strongly about it.]
- The excellence of your organisation and its work
[What is your track record and reputation? What do people say about you? Do you have evidence of your achievements?]
- The extent to which your work is innovative
[Many funders like new ideas or approaches. It may be difficult to develop new projects all the time, but if you are dealing with a problem in an unusual way with much better results, it is good to promote this.]
- The cost effectiveness of your work
[Of course, funders like to see value for money. What is the value of your volunteers' time? Are you able to use venues and/or other resources for free or at a low cost?]
- Any element of investment or leverage
[By supporting your work, will a funder be investing for the future or potentially enabling more money to be raised e.g. match funding?]
- Endorsements by respected people
[Funders are likely to be influenced by the views of people they respect. If they trust you then the funder is more likely to.]
- The involvement of volunteers
[The involvement of volunteers, including trustees/management committee members, means people are willing to give up their time to support your work. Their involvement shows that your work must be something valuable for the community and increases community participation and cohesion.]
- Support given to you by your community
[This might not be local – it could also be a wider community of interest.]

- The serious consequences if your work were to stop
[This can sound like a threat, so you need to be careful about this.]

Developing relationships with funders

Before you've got funding, you can develop relationships by:

- Researching and calling funders
- Going to 'Meet the Funder' events
- Going to meetings and conferences
- Inviting funders to your events
- Contacting previous funders
- Networking at events and conferences especially those focussing on your area of work – funders interested in this area may attend

Additional points:

- Make sure you have read all the information provided by the funder, especially their application guidance and criteria. This is essential but many grant applicants do not do this. There is no point wasting effort on a funder who does not fund your kind of work (or organisation – e.g. non-registered charities).
- Check whether you can ring them – some smaller trusts categorically state that contact must be by letter only; some larger funders have helplines. If there's a helpline or a phone number to answer any questions you may have – use it!
- If you've been funded by a funder previously, ring your contact there to tell them about what your organisation has been doing, discuss future funding, application deadlines, possibilities for continuation funding (if recent). If you had developed a good relationship with them previously, they're likely to be pleased to hear from you!

When you ring charitable trusts and foundations:

- Prepare your questions before you ring – write them down if necessary. Be clear about the work you'd like them to fund so you can explain it well.
- Engage the grants officer or trust administrator in conversation about the project – listen and write down the points they tell you. Sometimes, grants officers provide some extra information about the funders' priorities, help you to understand the specific emphasis or approach of their grants committee – it is a good idea to take notes.
- You may have more than one project in mind; you could discuss two possible projects with a funder, so long as they are both clear and meet the funder's criteria. By discussing a couple of options with the funder, you may get a better idea of which project is most likely to be successful.
- If it's not clear from their published information, ask them – how much money is it acceptable to ask for? If average grants are listed on their websites or printed information, check that the amount you want to ask for is acceptable.
- Read their website and ask some specific questions. Check whether the work or project you would like them to fund fully meets their criteria. Show that you have done your homework and really thought about your project in detail. Grants

officers will remember this and are more likely to advocate on your behalf when you send in your application.

- Many funders list the grants they have given out recently. Read through these lists to get a clearer idea of the types of projects the funder likes to fund, location of recent projects, average amount of grants etc.
- When talking to funders, try to mention an example of how you've supported a particular service user and the difference this has made. A powerful and specific example is more likely to stick in a grants officer's mind.
- If anything is not clear to you about a funder's process or application form – check this out with them. Make sure you understand their questions. Sometimes discussion about the meaning of questions will also enable you to understand their criteria better.
- Smaller trusts: Ask them what kind of work they generally like to fund (if this is not clear from their information)
- Smaller trusts: Try to ask what kind of letter they would like? How long?
- Smaller trusts: If possible, engage them in conversation before applying – talk about your work, the project you have in mind etc.
- Smaller trusts: A friendly conversation with the trust manager or administrator can enable you to build a good rapport with her/him. If you make contact with staff in a smaller trust (and they know and like you) this could influence the process. Note – with larger or government funders, it is more difficult to build relationships with staff as there are usually several members of staff, many applications and stricter procedures.
- Bigger funders: If the project you have in mind doesn't quite meet the criteria, check how it could be adapted to fully meet their criteria. However, be careful – don't just ring up and say you want to apply, what would they like to fund? This shows you haven't read their criteria, and don't have clear priorities as an organisation. Grants officers will also remember this!

Preparing for phone or face to face interviews:

- Find out what the format of the interview will be, who needs to be involved, the type of questions they will ask
- Make sure all the relevant people can be there, if only for part of meeting
- If the meeting is taking place at your premises - be welcoming! Make sure everything is running smoothly – it is good to choose a day when activities are happening but things are not too chaotic. Offer refreshments if appropriate.
- Have all your paperwork ready and organised – funding application, governing document, policies and procedures, leaflets, annual report, etc.
- Think about the type of questions the funder might ask and prepare your answers, especially if you think you may have to deal with any difficult issues. (just like a job interview!)
- Tell them about real examples of how your organisation has helped individuals change their lives.
- Keep a 'credibility file' – copies of articles/press cuttings, letters of support, letters or quotes from beneficiaries, case studies, leaflets, reports, research and stats that support the need for your work, photos, quotes or endorsements from prominent people or key people in your area/sector, evaluation reports (including summaries of key points), etc.
- Be polite (even if they annoy you!) – but assertive
- Thank them for taking an interest in your work

- Find out how and when they will make a decision

If you are successful:

- Ring and/or send a thank you letter and/or return grant agreement documents (and bank the cheque!) as soon as possible – otherwise the funder will think you don't really need the money and your relationship will get off to a bad start.
- If you're not clear about the monitoring requirements, clarify as soon as possible so you can get your systems in place or adapted right away
- Tell funders about your difficulties as well as your successes. This can also contribute to building a **good** relationship – if something is not going well and you can explain why; most funders will understand and negotiate changes. If you hide difficulties from them, this is much more likely to sour the relationship, lead to more problems for the project and/or organisation, and could jeopardise future funding
- Keep the funder up to date with your activities and successes, beyond their standard monitoring requirements e.g. regularly send articles, success stories, letters of thanks from beneficiaries, endorsements by influential people etc.
- Grants officers/funders may not be able to attend your events or visit – but it is still important to invite them. It shows them that you are a thriving organisation and confident about the quality of your work.
- Prepare for visits by funders (similar to points re: visits before funding)
- Doing great work, doing what you said you would do, sending in monitoring reports on time – all help to build good relationships with funders. They will see you as a reliable, high quality organisation. This will also help to build your reputation and relationships with other funders – **they talk to each other!**

If you are not successful:

- Getting feedback is very important. Some funders offer specific feedback and this can be very useful for improving future applications. If the funder says there were simply too many good applications this could be true but try and find out more about why others were successful – it may be because the funder wanted to reach different regions or received too many applications for a particular type of work.
- If you really believe that a specific funder fits your work, keep in touch with them by sending reports of successful projects funded by other funders in the hope that they will fund you in future.
- Be persistent – don't give up! Being rejected feels bad but it's important to keep going. Most organisations get many more rejections than successes.
- Try to maintain your confidence and enthusiasm – remember *why* you're fundraising (to improve the lives of your beneficiaries); if you believe in your work, this will come across.
- Plan when and who you are going to apply to and stick to the plan (even if some applications are rejected)
- Get support – work with others who you respect, to give each other encouragement and constructive feedback.

Building relationships with commissioners

In the past most government funding for voluntary and community organisations was given in the form of grants; now government bodies are commissioning public services. They invite potential service providers to compete for contracts to deliver particular services (both existing and new services). The contracts are available for voluntary, private and public sector organisations to bid for. This is a huge change in the way public services are funded.

The commissioning process¹ involves finding out what local people need, designing and planning services to meet those needs, then 'buying' the services. Unfortunately, there is no standard approach to public service commissioning; this means that the process for commissioning public services in each borough, each Primary Care Trust or for agencies such as Learning and Skills Councils, can be different. To find out more about the process in your local area, the local Council for Voluntary Service (CVS) is a good place to start.

Reaching and influencing commissioners

Making contact with commissioners can be difficult, but here are some ideas of the kinds of people, meetings and networks that will have an influence on the commissioning process. At some of these meetings, you should have an opportunity to meet commissioners themselves.

- Local Strategic Partnership (LSP): it is especially important to make contact with the voluntary sector representative (LSPs have different names: in Brighton the LSP is called the 2020 community partnership, in Hackney it is called Team Hackney)²
- Sub committees (e.g. children and young people, health, community safety, etc.)
- Local authority councillors
- Local Members of Parliament
- People responsible for domestic violence in a local authority (e.g. Domestic Violence Co-ordinator)
- Equality and Diversity officer
- Multi-agency domestic violence forum (e.g. Camden)
- Neighbourhood forums or partnerships
- Community Empowerment Networks (e.g. Hackney)
- Supporting People Team
- Consultation meetings (Local authority, Primary Care Trust, etc.)
- Citizen's Panel – to consult with local people
- Local Involvement Networks (LINK – new networks of individuals, groups and organisations with interest in health and social care)
- Local GP surgeries
- London Councils forums
- Local authority representative on London Councils grants committee

¹ See Women's Resource Centre's guide to commissioning and procurement (available in September 2009)

² See Women's Resource Centre's factsheet on Local Strategic Partnerships

- Directly elected mayor (3 boroughs only – Hackney, Newham and Lewisham)

Steps in the process:

In order to influence commissioning or be in a strong position to bid for a contract, it is very important to begin preparing as soon as possible.

1. Identify what sort of power and influence you already have:

- What expertise, credibility, independence, access to service users, resources or knowledge do you have?
- What connections and networks do you already have? Who do your MC members, volunteers or service users have links with? What about friends, colleagues, neighbours, local businesses etc.?
- What kind of reputation does your organisation have already? How can you develop a stronger reputation?
- Has your organisation had any positive publicity in the media? How can you raise your profile?

2. Collect information:**Find out about important people and meetings:**

- Your local Council for Voluntary Service (CVS) should know about any consultations that are taking place and the various local committees that you may want to get involved with. So the CVS is a good place to start.
- Find out who is on the local Local Strategic Partnership (LSP). You can use 'Google' or talk to the local CVS (who often represent the voluntary sector on the LSP)
- Find out which meetings make important decisions affecting your work
- Find out which local authority councillors have influence over your work
- Find out if any councillors are likely to be sympathetic to your cause.
- Research your local authority cabinet (the executive committee of the Council) – find out if any members have an interest in women's issues. Look at the local authority website, where you can find out who the councillors are and who the cabinet members are. You can then 'Google' them to find out their interests.
- Find out who is on the community empowerment network (if there is one) and lobby people who are sympathetic to women's issues
- Find out who the local authority Equality and Diversity officer, and if relevant, domestic violence officer, is – they may be useful contacts for finding out about consultations, commissioning opportunities coming up etc.
- Find out which commissioners are relevant to your area of work. There is a high turnover of commissioners, so this is an ongoing process.
- Find out how the commissioning process works in your local authority or area of work. How do commissioners identify the needs of the community or any gaps in services or local trends? It is very important to get involved with the process as early as possible; so, for example, if the local authority is consulting about the types of services that are most needed, it is important for you to give your views at this stage.

Find out about important strategies. If you are working in a local area, concentrate on your local authority's strategies; if you are working regionally or nationally, you will need to be aware of national and regional strategies.

- Find out which local, regional and national government strategies relate to your particular area of work e.g. Every Child Matters (national government strategy for children and young people), The Healthcare for London Programme (regional healthcare strategy), local authority community safety strategy
- Each local authority has a Local Area Agreement which outlines the local authority's priorities for a 3-year period. What are the specific priorities for your local area?³
- Local authorities should also have a long term (10-year) strategy called a community strategy. What is the long term strategy of your local authority?
- Find out if there are any government reports or any government or academic research that back up your case?
- If possible, find out about any 'hidden agendas'.

3. Prepare your case:

Women's organisations need to convince commissioners of their case before they even begin to tender for contracts. You are likely to be competing against larger, generic organisations, so as described above, you must be able to clearly explain your organisation's strengths, specialist knowledge and expertise. It is also important to:

- Have strong evidence to show the need for your work (e.g. evidence based on monitoring and evaluation of your own work, independent research that provides evidence of need).
- Show commissioners that your work has positive and long term outcomes for beneficiaries. You can describe your achievements by using case studies, user feedback and evidence from third parties.
- Record (and analyse) information about changes and gaps in local provision affecting your service and your beneficiaries. You will be in a stronger position to tell commissioners about unmet needs, new demands or social trends. This can open up a discussion with commissioners and provide valuable information that they can use for developing their future plans.
- Give so much good evidence that it is difficult for them to say no!
- Link your work to Local Area Agreement targets (e.g. Re: domestic violence, substance misuse, maternity, employment etc.), the local sustainable community strategy, your local authority's gender equality scheme⁴ and relevant government policies. Commissioners are often under pressure to show that their services meet central or local government targets or policies. It is important to show commissioners how your organisation can help the commissioner meet their objectives. You may also be able to show how you can help to reduce their costs and provide extra value.
- Present your case positively: i.e. we know you have a problem and we can help solve it. Be a constructive critic and propose solutions to their problems. Remember that you are helping them to meet their objectives as much as they are helping you.
- It is likely that you work with people in the community that commissioners or government funders want to reach. Provide opportunities for commissioners to meet and talk with your service users; this can be a way for

³ Please see Women's Resource Centre factsheet on Local Area Agreements

⁴ See

them to hear about their experiences and needs, the benefits of your services, and contribute to the development of future services.

- Tailor your message to whoever is in power locally. Depending on whether your local authority has a majority of Conservative, Labour or Liberal Democrat councillors, you may need to present your case differently to show how you can help them meet their priorities. This may not always be possible but sometimes the way you describe your work can make a difference when seeking the support of local councillors or commissioners.

4. Engage with commissioners or others who have influence on them:

It is important to get involved with the commissioning process as early as possible, so that you can express your views about local needs and the type of local services that are needed.

- Participate in consultation meetings, forums, networks, sub-committees etc. Although this takes time, these meetings can be an opportunity to meet commissioners, raise your organisation's profile and influence policies, strategies and future services. However, it is important to prioritise! You can't get involved in everything, so it is essential to choose meetings where you think you can have the most impact.
- Try to engage with commissioners: invite them to your organisation's events or project visits, ask them to speak at your AGM, involve them in meetings about your area of work (where appropriate) etc. This can help commissioners understand the realities faced by your service users and by staff delivering services.
- Build relationships over time and try to use their language: talk about more than funding; instead, talk about collaboration, partnerships and investment. It is also good to stress your 'added value'.
- Be aware of 'participatory budgeting'. This is a pot of money for local people to decide how to spend (see WRC factsheet) and all public bodies are starting to do this now apart from the police. You may need to get lots of sympathetic people along to meetings to vote and this can be another opportunity to engage with commissioners and local councillors.

Note: Once a tender has been advertised, you must not try to influence or lobby commissioners as this could be seen as trying to gain an unfair advantage and prevent your organisation from being able to bid for a contract.

Challenging the process

Engaging with commissioners and public bodies can be a complex process, but sometimes you may find that you are being treated unfairly. There are now several cases of local organisations successfully challenging public bodies which have withdrawn funding suddenly without consultation or explanation (see Public Law Project for case studies). It is useful to be aware of the following information and resources if you are thinking about challenging the process:

Making the case for continued grant funding

Often local authorities or other public bodies say they are required to tender for goods and services under EU law but this is not always the case, especially for

provision of social welfare services. Although public bodies have the right to choose to provide all their funding through a commissioning process (instead of grants), it is possible to argue the case for retaining some local authority grant funding, using government guidance.

For more information, please see the **Local grants Forum** leaflet and website. The Forum is a partnership of national organisations campaigning to save grants and improve commissioning.

<http://www.navca.org.uk/stratwork/natpolicy/localgrants/home.htm>]

Gender Equality Duty:

The Gender Equality Duty came into force on 6th April 2007. Public authorities are now legally required to: 1. eliminate unlawful discrimination and harassment and: 2. promote equality of opportunity between men and women.

They must also:

- Prepare and publish a 'gender equality scheme', including addressing the 'gender pay gap'
- Gather and use information on how their policies and practices affect gender equality in the workforce and delivery of services
- Consult stakeholders
- Assess the impact of its policies and practices on gender equality
- Implement actions in its Gender Equality Scheme within three years unless unreasonable or impracticable to do so
- Report against its Gender Equality Scheme every year and review every three years.

You can use the Gender Equality Duty to encourage public bodies to take action on gender inequality or use it to show how your work can help them to meet their obligations under the Duty. For more information please see:

[see **Guidance on the Gender Equality Duty for the voluntary and community sector**, Equal Opportunities Commission, July 2007; and WRC's guidance: **Gender equality scheme: a template for local public bodies**

http://www.wrc.org.uk/resources/guidance_for_public_bodies.aspx]

Intelligent commissioning:

Central government and other public bodies such as the National Health Service have defined good practice in commissioning, calling it 'intelligent commissioning'. Principles include:

- When identifying and developing an understanding of local need, public bodies should consult and engage with voluntary and community sector organisations, including service users;
- Consultation with voluntary and community sector organisations should be well in advance of commissioning of new services and public bodies should work *with* the voluntary and community sector to decide on priorities;
- Outcomes for service users should be the main focus;

- Public bodies should consider investing in the capacity of service providers, especially those working with 'hard-to-reach' groups (e.g. by providing support with understanding the commissioning process and enabling organisations to meet their requirements);
- The contracting process should be transparent and fair;
- Public bodies should consider tenders from partnerships/consortia of several organisations where appropriate;
- Public bodies should ensure long-term contracts and share risk where appropriate;
- Public bodies should seek feedback from service users, communities and providers to review effectiveness of the commissioning process.

You can refer to 'intelligent commissioning' when lobbying public bodies to follow good practice in their commissioning process.

For more information, see: National Association of Voluntary and Community Action (NAVCA) briefing on commissioning and procurement:

<http://www.navca.org.uk/localvs/lcp/briefings/>

Compact:

Established in 1998, the Compact is an agreement between Government and the voluntary and community sector in England. It recognises shared values, principles and commitments and sets out guidelines for how both parties should work together.

It is based on five 'codes' focusing on BME communities, community groups, consultation and appraisal, funding and procurement, and volunteering. Each local area and region should have its own local compact and follow the government's specific guidance on commissioning published in February 2009.

For more information about the Compact, please see:

<http://www.thecompact.org.uk/aboutus> and for a copy of the specific guidance on commissioning:

<http://www.thecompact.org.uk/files/103954/FileName/CommissioningGuidance.pdf>

Duty to involve: This is a new duty on public bodies from April 2009 to inform, involve and engage 'representatives of local persons', including marginalised or vulnerable members of the community.

You can refer to this duty in order to ensure that public bodies consult with you and your service users about local needs, etc.

See WRC factsheet at:

http://www.wrc.org.uk/includes/documents/cm_docs/2009/d/duty_to_involve.pdf

Resources:

National Association for Voluntary and Community Action (NAVCA) has resources, information and advice on commissioning and procurement

<http://www.navca.org.uk/localvs/lcp/>

National Council for Voluntary Organisations (NCVO) Compact Advocacy Project can provide help and support on how to use the Compact, what principles have been breached and how to best challenge:

<http://www.ncvo-vol.org.uk/compactadvocacy/>

The Public Law Project aims to improve access to public law remedies for those whose access to justice is restricted by poverty or some other form of disadvantage. PLP provides advice and information, training and case work.

<http://www.publiclawproject.org.uk>

All three of the above organisations are running the **Empowering the Voluntary Sector Partnership**, providing advice by telephone (020 7520 3161) or email (evsAdvice@ncvo-vol.org.uk) and training in using public law.