

IVAR

Sussex Community
Foundation Unrestricted
Funding Study:
Final report
August 2017



Authorship and acknowledgements

This evaluation was written for Sussex Community Foundation and The Blgrave Trust by Leila Baker, Eliza Buckley and Houda Davis.

The team would like to thank Adventure Unlimited, Extratime, Mankind and PACSO for their participation, contributions and insights.

IVAR, London 2017

Foreword

Kevin Richmond, Chief Executive, Sussex Community Foundation

Sussex Community Foundation (SCF) believes that long-term change comes from within communities, and that charities and community groups usually know best about the needs of the community they serve. We aim to be flexible, responsive and proportionate, and to reach smaller charities that many other funders cannot. Perhaps most of all we aim to develop a long-term relationship with charities and community groups across Sussex, providing the financial support that they need throughout their development.

Launched in 2006, our early years focused exclusively on providing small one-off grants of up to £5,000. But although groups need to apply anew each year, we have funded many organisations year after year.

In 2013, we were approached by the Blagrove Trust, which had previously worked with a number of other community foundations. They were looking to expand their work into Sussex and wished to work with SCF on a project which would have mutual strategic benefit.

This coincided with an internal review of our grant strategy. The trustees wished to develop a 'mixed economy' of grant-making – including larger and smaller grants – and to combine proactive and responsive approaches. We shared the Blagrove Trust's goal of exploring the value of unrestricted grants.

With this in mind, our discussions with the Blagrove Trust led to a three-year grant programme which has enabled SCF to develop a process for making larger grants, and both parties to test out an unrestricted grant-making programme.

This evaluation report examines the midpoint of this programme and identifies the lessons learnt by the two grant-making partners and the outcomes achieved by the grant recipients. It makes recommendations for future grant-making and for the final evaluation of the programme.

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Part One: Introduction

Background

Sussex Community Foundation runs a programme with the Blagrove Trust that makes unrestricted grants of £25,000 to four organisations each year for three years. All of the organisations work with children and young people and focus on one or more of the following: vulnerability, disability and special educational needs addressed outside formal education.

The initial impetus for this programme came from the Blagrove Trust, which has a strategic interest in unrestricted funding and wanted to work with community foundations on the basis that it does not usually provide large grants. The Blagrove Trust has also worked in neighbouring areas and wanted to expand into the Sussex area.

Specifically, the Blagrove Trust stated that it is 'looking to see how the grant would enable local organisations to make a significant step change in their ability to make a difference to the lives of disadvantaged children'.¹

SCF has traditionally made small grants to small organisations but, following a grants management review in 2013, the Board decided to move towards a 'mixed economy' of grant-making, of which this programme forms a part. SCF does currently offer multi-year grants, but this new programme brings together unrestricted, larger grant-making and multi-year elements for the first time.

Since this is a new way of working for SCF, the Institute for Voluntary Action Research (IVAR) was commissioned to carry out a study to help the funders to better understand:

- The range of ways grantees are using this multi-year unrestricted funding and the insight this could give to the funders as to the value of this kind of funding.
- How SCF might track changes over time brought about by unrestricted funding.
- What SCF and the Blagrove Trust can learn from this programme to inform their strategies.

At the time of the research, SCF was 18 months into the programme and had just awarded the second year of funding to three of these organisations²:

- Mankind
- Extratime
- PACSO
- Adventure Unlimited

Methodology

There were three elements to the review:

In-depth interviews: 11 semi-structured interviews, both face-to-face and by telephone, with staff and trustees from SCF and the grantee organisations, as well as staff from the Blagrove Trust.

Desk review of documents: programme documents, grantee monitoring reports and SCF reports to the Blagrove Trust. A full list of documents reviewed can be found in Appendix C.

¹ *Criteria and Guidance Notes: The Blagrove Trust Fund 2014*

² One organisation had been experiencing difficulties for some time and, despite the best efforts of staff, volunteers and trustees, closed at the end of August 2016.

Interactive workshop: facilitated event which brought together grantees, SCF and the Blagrave Trust to jointly discuss the review findings, identify key learning and think together about what they might mean for future grant-making.

The grant-making process

The following section provides a brief summary of the grant-making process to contextualise the findings and some of the comments made by recipients.

Sussex Community Foundation invited applications to the fund in the autumn of 2014. Specific guidance was drawn up for this fund and a specific application form was designed, effectively an extended version of SCF's standard application form. Twenty-nine applications were received. These were evaluated by the SCF grants team before being presented to a grants panel made up of SCF trustees and staff and Jo Wells from the Blagrave Trust. The panel reviewed all applications and shortlisted a number for an assessment visit by a panel member. The grant awards were decided at a second panel meeting.

After grants were awarded, SCF's Programme Manager met with each grant recipient to agree their goals and a monitoring framework for the first year. This allowed the monitoring format to relate directly to the needs and goals of each organisation.

The Programme Manager agreed to call each recipient after six months for a verbal report. These were collated into a written report from SCF to the Blagrave Trust.

Each grant recipient was required to return their monitoring report on the previous year, and to outline their plans for the next year of the programme, before the grant for subsequent years was approved.

This process has enabled SCF to remain in close contact with the grant recipients and to tailor the monitoring regime to each group and project.

Part Two: Findings

Purpose of the grants

All grantees were very positive about the funding received and the changes that they had been able to achieve for their organisations and beneficiaries. Indeed, two grantees commented that the grant was disproportionately beneficial for its size: *'because there are no strings attached, or at least fewer, it allows us to do our own thinking about what is needed which is different to other grants.'*

When asked to describe the grant, interviewees gave different meanings to the term 'unrestricted funding'. Below, we set out these different meanings and then suggest that, nonetheless, there is a common understanding of the opportunity that these grants represent.

The grants were described by SCF in the *Criteria and Guidance Notes* as 'unrestricted funding' with 'no determinants as to what can be applied for'. At the same time, organisations were asked to 'demonstrate the significance of the grant and the work proposed to the development of their organisation's longer-term strategic aims, or mission'.

When we spoke to grantees, they tended to describe the grant as 'strategic':

'It was pretty clear that it was about strengthening the organisation and sustainability of the organisation.'

'[The funders] clearly wanted us to have a plan for how to spend the money ... I know they are saying it is an unrestricted grant but I've always seen it as a strategic grant, because they are asking us what we are going to do with it.'

In other words, grantees felt that because they had to indicate what they were going to spend the money on, the grant was strategic rather than unrestricted. They used 'unrestricted funding' to refer to donations with no prescribed use or reporting requirements:

'... our earned income is unrestricted, or the funding I get from one trust that just gives the money upfront and then I write a letter at the end of the year saying what we've been up to... Accounting-wise, we don't classify this grant as unrestricted ... we had to give a budget so it was never really core funding as we had to say how we'd spend it.'

Because of the strategic focus of this grant, one grantee felt that they could not spend the money on delivery, but this was perceived as a good thing:

'I think it's been a real strategic investment ... there was a sense that we couldn't spend it on delivery and that it was about strategic development - that was a luxury and really nice for staff to know that.'

The grant is 'unrestricted' in the sense that the organisations have been allowed to identify their organisational needs and invest as they see fit. Grantees understood that the funding was flexible and they could change their plans, and some did. What is meant by 'strategic' has therefore been left open to interpretation and this was something that the organisations really valued.

We know from other research that there is widespread variation in the meanings people attach to 'unrestricted funding'. Despite the variation as to what exactly 'unrestricted funding' means, our findings suggest that there are some common features of how people perceived this programme - that it is strategic, flexible, long-term and responsive to individual organisations' needs.

How the funding was used: strengthening organisations

Overall, grantees felt the purpose of this funding was to strengthen their organisations. It gave them space and time to think, explore, experiment and develop. While each organisation used their funding in different ways, we think it is possible to identify five (overlapping) categories.

1. A chance to explore new ideas and plan for the future

All four organisations used a proportion of their grant to explore new ideas. They said that as service delivery organisations, they were not often afforded the opportunity to conduct research or carry out comprehensive planning:

'Blagrove gave us an opportunity to find out what was needed – the space and time to explore and really understand. It took a lot of the anxiety away being able to just focus on what is needed like that and not worry about delivering something specific.'

They used the grant for a range of activities including:

- Consulting with service users
- Exploring possible mergers
- Exploring different funding models
- Considering options for acquiring premises

Through this, the organisations have:

- Made changes to services to better suit the needs of service users and reach more young people. For example, one organisation was able to change its service delivery model from a buddy scheme reaching 30 young people a week, to a *'clubs model'* reaching 70 young people a week.
- Developed new services to fill gaps in service provision for different age groups and across geographic areas. For example, one organisation created new services in response to a consultation, including a dance club and after-school clubs in areas of relatively high deprivation and high numbers of young people with autism.
- Positioned themselves to help shape the local environment: *'we are operating at a better more strategic level locally and that is new'*.
- Made informed decisions about significant organisational changes, such as mergers, funding models and investments.

The grant has therefore provided an opportunity for organisations to develop an evidence base on which to make decisions and explore ways to adapt to a tough and changing environment.

2. Working towards financial sustainability

Grantees faced similar challenges around funding, including: managing many small pots of money from multiple funders; seeing reduced levels of statutory funding; the effects of changes to commissioning processes. This has resulted in the need for organisations to adapt their services to get *'more for less'* or consider options to change their funding models entirely. Grantees saw the funding from this programme as an opportunity to tackle these challenges: *'the overall aim was about improving financial sustainability, that was the bottom line, but how we chose to do that was up to us'*. This organisation used the funding to develop a new income strategy and to explore non-charitable trading, social enterprise models, and partnerships.

Grantees also reflected that the unrestricted funding had placed their organisation in a more financially sustainable position, relieving some of the pressure of the constant need to search for new funds. For small organisations, fundraising (and reporting requirements) takes up considerable time and resources, as one interviewee noted:

'The Blaggrave grant means we aren't trying to squeeze time into a small team already to do general fundraising – that takes time away from the real work. This grant gives us the luxury of flexible funding and letting the CEO focus on delivering what is central to our mission.'

Some interviewees felt that having the grant had contributed to securing further funding, such as a large National Lottery Grant, match funding for consultation work, and a significant council contract to deliver services in the local area.

For one organisation, the grant helped it to carry on delivering services for longer and close down properly. Some of the funding and a great deal of effort had gone into addressing this organisation's financial problems, but because of other internal and external factors, this was not, sadly, enough to keep them afloat.

3. Strengthening organisational structure and systems

All four organisations spoke about using the funds to review their organisational structure: *'a chance to actually look at what we do and whether we do things cost effectively, and whether we are getting the best out of our funds'*. For one organisation, the funding has provided space to pause, re-orientate and restructure after many years of delivery, in order to adapt to the changed funding environment.

The grant allowed a CEO in another organisation to take time to work with staff on organisational systems, which has helped to develop the *'sense of one team and ownership of us as an organisation'*. The grant was also used as a contribution to organisational overheads – described as *'the boring stuff'* – to make the organisation *'fit for purpose'*. This included purchasing office equipment such as desks and chairs, moving the organisation to a standard email system, and updating financial systems. Two out of the four organisations used the grant to employ new staff to help with administration or lead on particular areas of work.

4. Using research to improve services

The time and space described earlier provided organisations with the ability to step back from service delivery and think about changing and improving services for beneficiaries: *'overall this is about improving the quality and quantity of our services'*.

Grantees were able to carry out research and consult with service users to identify gaps in provision and develop a knowledge base in order to change or develop services. For example, running focus groups with young people allowed one organisation to identify a significant gap in community-based prevention. This led to a decision to move beyond direct service delivery to create an ambitious plan *'to plug this gap'*. Another organisation created a new youth club and a 'youth led' post based on evidence of gaps in provision for 16-year-olds and in autism services in areas of high deprivation.

In addition to carrying out consultations, the organisations also focused on drawing knowledge from individual staff to think about the impact of services, provide insight into local policy forums, and tailor services to families' needs. One organisation had been running a service which was highly valued by parents, but through consultations with staff and parents they identified an opportunity to radically change the service to reach more families and improve working conditions.

5. Increased confidence

Interviewees reported being able to make a bigger contribution to local voluntary and public-sector networks and planning meetings. As one interviewee noted: *'we are moving towards feeling an important part of the local infrastructure – I think part of this is us having greater confidence that we have value ...'*. They attributed this confidence in part to having developed a stronger evidence base for their work:

'We have more confidence now to be at the decision-making table with strategic partners. I feel like we are operating at a better, more strategic level locally and that is new – [we're] really raising our profile in the local community.'

Interviewees also noted that they felt better able to network and build local partnerships; they gave examples which included the local YMCA, Brighton & Hove Albion Football Club and other funders.

Issues that emerged because of a 'step change'

As demonstrated, the grants gave organisations space and time away from direct service delivery to think about what they could do differently to strengthen their organisations and better meet the needs of disadvantaged or vulnerable young people. The programme is still underway but already shows a real prospect of the hoped-for 'significant step change in their ability to make a difference in the lives of disadvantaged children'.³ While this has led to many positive benefits, perhaps unsurprisingly it has also led to some challenges.

These challenges appear to centre around leadership and the kinds of leadership that organisations require – from their CEOs and boards – during periods of organisational change. Grantees said that, as the organisation changed, so too did their governance requirements. They found they needed new experience and skills to help them make big decisions about organisational direction (e.g. buying a property, merger, changes in funding models). One interviewee said the following about her board of trustees:

'Our trustees are really a committed group of mothers, more like a steering group ... it's not the same thing they [the trustees] signed up for ... I don't want to expose them to risks that could be mitigated by having a few professionals on the Board.'

The leaders in the four organisations are committed, passionate individuals with clear visions for their organisations, who recognise the challenges of making a 'step change' in their strategy and operations. Several interviews expressed a need for some form of mentoring support or professional development to help them adapt to rapid organisational growth or follow through with recommendations that emerged from their research and consultation work. This was seen as particularly important for small organisations: *'CEOs of small organisations don't get the professional development or mentoring support that might be available in larger organisations.'*

One of the four organisations funded through this programme had been forced to close. Interviewees from this organisation said that one factor had been a lack of leadership and external support: they had a high turnover of CEOs over a relatively short period, the last of whom stayed only one year. The CEO role was described as *'an impossible job because of the huge pressure of finding funding and being responsible for overall management in an increasingly difficult environment.'* Interviewees also said that they knew they needed a stronger board, but explained that it is hard to put the necessary time and resources into finding new trustees in a city with a large voluntary and community sector. They felt that, in the absence of a CEO, staff and trustees lacked the time and/or did not know who to approach and how to ask for help. They continued to operate in an increasingly difficult environment. For example, several of the organisation's long-term grants came to an end during a short period of time; their volunteer numbers had dropped, leading to increased costs; and a planned partnership, that might have helped the organisation to keep going, did not come to fruition. With the considerable benefit of hindsight, it is hard to see how the closure of this organisation could have been avoided given the circumstances interviewees have described.

Reporting

³ *Criteria and Guidance notes for Blagrove Trust Fund (2014)*

Grantees generally found reporting requirements for this grant to be proportionate in comparison to other large grants. It was felt that the frequency and structure for reporting, as well as the strategic nature of this grant, meant the organisations could give a holistic picture of progress. One interviewee commented:

'If I'm given funding for a play scheme, I am only able to report on that play scheme and the funder will not see the impact within the greater scheme of things. Whereas with Blagrove funding I can show you impact across the board.'

This 'holistic picture' includes describing how they have responded to external changes in general, as well as reporting on the specific aims of their grant. During the event, one grantee reflected that the process of completing the monitoring reports was both enjoyable and useful because it gave her a chance to reflect on how the organisation was progressing.

Part Three: Conclusions and recommendations

This section draws together findings from the study as well as key points emerging from the discussion which took place when funders and grantees came together in January 2017.

Our findings demonstrate that the four core grants awarded enabled the organisations to explore how best to meet the needs of their beneficiaries in the most appropriate way. It provided flexibility for them to decide what was needed and respond to this by trying things out through, for example, consultations or testing new approaches. The grants emboldened the leaders of these organisations to take chances and be open about what they didn't know and wanted to find out about. It was an opportunity to reflect, look inwards and invest in themselves – either strategically or simply by making an office fit for purpose.

Looking ahead to the provision of this kind of funding in future and the role of Sussex Community Foundation, we can highlight four areas for consideration.

1. Purpose of the funding

Staff at SCF acknowledged that there was a 'morph' from seeing the grants as unrestricted/core to having a more strategic purpose. This '*crept in during the assessment stage because of a need to take decisions about who to give it to*'. This was partly because grants staff recognised that helping organisations to create a 'step change' requires leaders that have the skills, vision and attributes to steer an organisation through significant changes.

When providing this type of funding, it might be helpful to:

- Describe the grant as 'flexible' or 'strategic' rather than 'core/unrestricted', and explain what is meant, perhaps by giving examples of what the grant could be spent on.
- Let organisations know about the grant well in advance so that they can prepare and make the most of the opportunity.
- Work closely with organisations at the outset to ascertain exactly what is needed in terms of funding, process and support.
- Consider the kinds of organisations that are likely to be attracted to the type of funding on offer to encourage applications.

2. Selecting organisations

The agreed purpose of future multi-year, flexible funding grants will affect the kinds of organisations that they are likely to appeal to or suit. Related to this, if future funding is aimed at creating a 'step change' in the ability of organisations to meet the needs of beneficiaries, it may help to give applicants an idea of what this might look like in practice. The research findings and discussion at the workshop in January 2017 suggested that 'flexible funding' or 'strategic grants' might be best suited to organisations who:

- Have a robust plan (organisations could present their own business planning document instead of going through application processes)
- Have or could develop strong leadership (to steer organisation through significant change)
- Are self-aware and have a willingness to reflect and be flexible
- Are at a point of transition or development

3. Understanding the impact of the funding

The type of funding given in this programme allowed SCF to invest in the whole organisation, not just one project. This approach was greatly valued by both grantees and funders. Grantees agreed that the way the reporting was set up enabled them to tell a holistic story about their organisation, providing a picture of 'distance travelled' as well as how they were responding to local context. This style of reporting could potentially have added value in supporting SCF to understand local needs and operate in a more engaged and proactive way.

At the convening in January, there was a discussion about the organisation that closed, and this raised questions about each of the funders' appetite for risk:

- Might it have been better to award the grant to a financially stronger organisation or take measures to minimise the risk, for example by withholding the second year of funding, when it became obvious the organisation was in trouble?
- On the other hand, the second year of grant funding allowed this organisation to close down properly, knowing they had explored all options. They also continued providing services for young people for longer than they would have been able to do otherwise.

It appears that, as a community foundation, SCF's values and embeddedness make it more able and willing to take a risk on a long-standing local organisation because it is invested in supporting the local sector and understands the context well.

4. Giving more than money

While grantees stressed the benefits of high-value, multi-year, flexible grants, they said the relationship with SCF went beyond a financial contribution. They thought that SCF could add value by brokering and facilitating relationships and networks between organisations in Sussex. This more relational style of grant-making is more resource-intensive but fits with the value SCF places on relationships:

*'We are here for the long term. Our success is based on the quality of the relationships we build with our donors and with local charities & community groups and on our ability to bring the two together to benefit the community.'*⁴

SCF may wish to consider (or do more of) the following:

- Broker relationships with other funders to bring in more 'unrestricted' (in the sense that donors are not prescriptive about use) funds from private donors.
- Take a more active convening role in places which lack strong local infrastructure (e.g. where there may be a weak CVS).
- Position itself as part of the local infrastructure (in partnership with others) to bring local knowledge to the decision-making table.
- Host or convene networking opportunities, particularly for small organisations, to support them to share and learn together.

⁴ *Sussex Community Foundation Strategy Update 2015-2020* (Staff Away Day June 2016)

Closing comments

Written by Kevin Richmond, Chief Executive, Sussex Community Foundation

What did we learn from this evaluation?

The report makes it very clear, and it is no surprise, that these larger grants have been beneficial for the organisations concerned.

It was interesting that our initial idea of 'unrestricted funding' developed into 'strategic funding'. Our assessment process, like many grant makers', was designed to assess projects, and initially both applicants and assessors found it hard to move away from this. However, we did develop a clear process for assessing the potential strategic impact for applicant organisations and agreeing developmental goals with each successful organisation, and this has clearly been beneficial to the recipient groups.

This emphasis that has developed for this programme - inviting applicants to identify what they need in order to strengthen the organisation and to put the case for the resources to implement these changes - appears to have been valuable and is one that we aim to explore further. This report has set out some suggested criteria for assessing strategic grants in future.

Yet there are questions that remain to be answered.

This programme has been of benefit to the four organisations which received a grant. But what about the 25 unsuccessful groups - would they have preferred us to give more small grants?

The closure of one group was clearly disappointing, but did the grant help provide a more managed closure and extend the help provided to young people, or was it a poor investment decision? The funders had been aware that this group was facing challenging circumstances and the hope was that this strategic investment might have helped them develop a new, more sustainable business model.

The report also makes recommendations about how Sussex Community Foundation could play a greater role in supporting the development of local charities. We need to consider how this relates to our goal of supporting a large number of local organisations, and perhaps whether we should target specific kinds of organisation for strategic support.

What issues do we need to investigate in the final evaluation?

SCF will undertake a final evaluation at the end of the three-year grant programme to identify:

- How have the four organisations funded changed over the period of the grant?
- Did they achieve their stated objectives?
- Did their objectives change?
- Are the organisations stronger, larger or more effective than in 2014 (using quantitative and qualitative data)?
- What do the organisations attribute to the grant? How would they evidence this?
- How could we identify criteria which will help us to assess whether an organisation is in a position to make best use of a strategic grant?
- What was the impact for unsuccessful applicants? Would they have preferred a larger number of small grants with a greater chance of success?

What will SCF do differently in future?

As a result of this evaluation, we now plan to evaluate all our large grants programmes, comparing the results of this programme with SCF's proactive programme in Hastings and other large grants.

This report encourages us to run further strategic development grants, where funding allows, using the findings of this report to design assessment criteria and process.

We are pleased that the recipients of large grants have valued our approach of working with them to devise relevant monitoring processes, so we will continue to develop this approach.

We will consider whether elements of this strategic approach could be incorporated into smaller grant programmes.

Finally, we will consider whether Sussex Community Foundation should specifically aim to support the infrastructure and capacity of organisations themselves.

What recommendations would we make to other funders?

Sussex Community Foundation would encourage other funders and donors to look into the idea of strategic development grants - they could be a very effective way of achieving charitable objectives and make for a stronger and more resilient voluntary sector. By offering longer term, unrestricted funding in this way we have seen how organisations have been able to grow and develop, be more forward thinking and independent, which is a great investment for the grants we are able to offer.

'The strategic nature of the initial grant offer has given us the confidence to invest in capacity building and strategic development that we would not have had otherwise.'

'This funding has allowed us to 'think outside the box' and has given us the confidence to push forward in our plans.'

Appendix A: List of Interviewees

Clare Elkington, Chair, PACSO
David Allam, Trustee, Sussex Community Foundation
Jo Wells, Director, Blagrove Trust
Kevin Richmond, CEO, Sussex Community Foundation
Laura Williams, Programme Manager, Sussex Community Foundation
Martyn Sullivan, CEO, Mankind
Mim Featherstone, Finance Manager, Adventure Unlimited
Peter Barrow, Trustee, Mankind
Sam Price, CEO, Extratime
Tessa Hibbert, Blagrove Trust
Val Evans, CEO, PACSO

Appendix B: List of workshop participants

Clare Elkington, Chair, PACSO

Kevin Richmond, CEO, Sussex Community Foundation

Laura Williams, Programme Manager, Sussex Community Foundation

Leila Baker, Institute for Voluntary Action Research

Martyn Sullivan, CEO, Mankind

Peter Barrow, Trustee, Mankind

Miranda Kemp, Head of Communications, Sussex Community Foundation

Ros Cook, Chair of Trustees, Extratime

Sam Price, CEO, Extratime

Tessa Hibbert, Blagrove Trust

Val Evans, CEO, PACSO

Appendix C: Documents reviewed

Adventure Unlimited grant application form
Adventure Unlimited 6 month report progress report June 2015
Adventure Unlimited – Strategic Planning Framework Process
Adventure Unlimited Appendix 2 – Financial Summary – April 15–March 16
Adventure Unlimited Blaggrave monitoring report Year 1
Adventure Unlimited 6 month progress report September 2016
Extratime grant application form
Extratime 6 month report template
Extratime – stakeholder consultation case study 13.4.16
Extratime six month progress report June 15
Extratime stakeholder consultation summary Nov 2015
Extratime Blaggrave monitoring report Year 1
Extratime six month progress report September 2016
Mankind grant application form
Mankind Blaggrave monitoring report Year 1 Jan 2016
Mankind 6 month report template
Mankind Blaggrave monitoring report Year 2
PACSO grant application form
PACSO 6 month progress report June 2015
PACSO Blaggrave monitoring report Year 1 2014–15
PACSO 6 month report template
PACSO Yr 2 monitoring report
PACSO 6 month progress report September 2016
Criteria and guidance notes for Blaggrave Trust Fund (2014)
Sussex Community Foundation report to the Blaggrave Trust February 2016
Sussex Community Foundation report to the Blaggrave Trust September 2016

Appendix D: Grantee interview questions

Use of grant funding

1. What did you think you would achieve with the funding? How did you think it would help?
2. What did you plan to do to achieve your goals? What things did you put in place?
3. Did you follow your plan or did some of your plans change? Where there were changes, can you tell me why those were made? Did you discuss these changes with Sussex Community Foundation?

Impact of the grant programme on your organisation

4. Overall, what difference has this grants programme made to your organisation? Can you give specific examples? Prompt: new relationships; new contracts; access to new funding; indirect outcomes; most significant contribution; independence as an organisation; your role; how staff feel about their work.
5. How is this funding different to grants you have had before? – project based AND core/unrestricted (if they've had it).
6. So far, we have mainly focused on the positives and contributions that this grant has made to your organisation. Do you perceive any downsides or difficulties with this kind of funding? Prompt: has the organisation thought about how it might fill any funding gap created by the end of the grant?

Application and reporting

7. How did you find the application and assessment processes? Prompt: how did the amount of work involved compare with other application processes?
8. How have you found the yearly and six-monthly reporting?
9. How does this reporting compare to other reporting your organisation makes to funders?
10. How does your relationship with Sussex Community Foundation compare with your relationships with other funders?

And finally

11. Do you have anything else to add in relation to your experiences of core funding?