

# Embedding direct experience into applications and assessments

*Comic Relief case study*

*April 2022*

---

With thanks:



# Comic Relief: The Global Majority Fund

*Lived experience at the heart of grantmaking*

**Interviewee:** Poonam D'Cruze, Senior Portfolio Manager

## About the fund

- Covid 19 impacted everyone in some way, globally and across in the UK. However, communities experiencing racial inequality were disproportionately affected. In April 2020, a report by The Ubele Initiative , projected that 9 in 10 specialist organisations led by and for communities experiencing racial inequality could cease operating if the lockdown continued beyond 3 months, and 68% of respondent organisations had no reserves to fall back on.
- The Global Majority Fund was designed and launched by Comic Relief to provide a targeted Covid 19 emergency response to respond to the disproportionate impact Covid 19 had on communities experiencing racial inequality, resulting from persistent racial inequality and discrimination experienced across education, health, the workplace and more. Additional funding was later provided by National Emergencies Trust and Barclays towards Phase I and Phase II.
- This case study is based on learning from Phase I of the Global Majority Fund, for which £4.2 million was provided by Comic Relief, National Emergencies Trust and Barclays

## How we approached the fund

At Comic Relief, we have always been interested in tackling racial injustice in our grant making and had been exploring how best to do this. Given the rapid spread of the Covid-19 global pandemic, we knew we had to respond now, and quickly made a case to our executive leadership team to ringfence dedicated funds for communities experiencing racial inequality.

The Global Majority Fund was an opportunity to do things differently – streamlining the application process, speeding up decision making and ensuring staff with experience of the issues at hand were at the heart of deciding where and how investment decisions were made:

*‘We knew decision making in this way was not ideal. Our aspiration was to have the process led by external experts who had first-hand experience of, and were closer to, how racial inequality had impacted grassroot communities.*

*However, recruitment of experts by experience would delay our ability to make investments by at least 6-8 weeks. We knew organisations led by and for communities experiencing racial inequality were facing imminent closure and communities were facing hardship where mainstream Covid-19 response failed to reach them. We didn't have the luxury of time'.*

## Getting money to the right people and places

In response to the initial Covid 19 emergency, we wanted to launch the programme quickly, distribute funding rapidly and ensure funding would reach where it was most needed. Our primary goal was to make responsible investments at pace. We knew that Comic Relief wasn't best placed to give directly to small grassroots organisations led by and for communities experiencing racial inequality as we lacked direct pre-existing relationships with them. Our grant-making systems and processes have traditionally been established for middle-income organisations.

We decided early on to work with Intermediary Technical Partners (ITPs) who would receive the funds and then make onward grants to smaller organisations. This was about respecting that we don't have the direct connections in the community, and we didn't want to carve out and create a space that ITPs already occupied and were well positioned to deliver an effective response.

Funding organisations through the ITP model helped to get money where it was needed in communities.

*'We trusted them to have expertise and connections to make effective onward grants. Each ITP took a different approach with different timings. Our role was to provide check-ins (NOT check ups!) and support if they wanted it but not if they didn't ask. We positioned our support as 'we're here if you need us.'"*

## Design and decision making

The Fund was initially led internally by experienced portfolio managers at Comic Relief who identified as from a community having experienced racial inequality. These individuals undertook the grant shortlisting and assessments because they had inherent experience of racism that meant they were more acutely aware of how racism intersected with inequalities, leading to discriminatory practice, trauma and marginalisation than white British colleagues may have been.

## Application processes

We simplified our application and assessment process to make it as accessible as possible. We lowered the income threshold and scrutinised our paperwork to determine what was essential to ask in an emergency context. We asked ourselves ‘*what do we really need?*’ For example, it was important to understand which communities applicants were working with (to ensure we were reaching a diversity of communities); where intermediary technical partners had existing relationships with grassroots organisations; and whether they were led by the communities they worked with.

## Try, reflect, learn and adapt

We tried our best to make the first phase of the Fund effective, speedy and inclusive, but we encountered some challenges and changed things for the second phase as a result. We asked for feedback from our ITPs about the process and experience to see what might need to change for a future round. We were challenged to sense check the questions we asked applicants:

*‘As funders, we are used to asking questions such as: ‘tell us about your needs; why do you need funding?’ which can be triggering and, in some cases, trauma-inducing. These questions require applicants to continuously justify their need, through the retelling of traumatic experiences and stories to justify why they should be funded. We need to stop doing this and consider an asset base approach, instead focussing on what communities are already doing; the difference this is making and how we (as funders) could help support or amplify this work. This starts a very different kind of conversation. Shifting the power must be there from the start in our language and intent and not just at the very end when it comes to decision making.’*

To this end, we made phase II of the Fund much more collaborative and participatory. We decided that external experts by experience would lead investment decisions, rather than Comic Relief. We recruited a group of representatives from organisations led by people who identified as from a community experiencing racial inequality to shortlist, assess and make investment decisions with us.

We used an informal interview process asking “why do you want to work with us” and “what experiences could you add to the process to help make the best investment decisions”. We recruited 10 assessors who led on the shortlisting and assessment process.

All assessments were undertaken by someone from Comic Relief and an Expert by Experience consultant. Both had to decide to recommend or not recommend; if no consensus was reached, it was discussed further at a panel meeting. The panel was made up of seven External Experts by Experience Consultants and two Comic Relief staff to ensure the power in decision making lay with Experts by Experience. On two occasions Experts by Experience made recommendations to fund organisations that Comic Relief was undecided about. The reasons for the indecision were met with respectful, constructive challenge grounded in experiences and viewpoints that we, as a large institutional mainstream funder, were less aware of, as we don't work directly with small grassroots organisations. We listened to our Experts by Experience and funded these two organisations; it was the best decision we made – they were phenomenal partners to work with.

Our assessors are usually Comic Relief staff and at times, external assessor consultants. When we looked at embedding lived experience, we had previously focussed more on including this at decision meetings. In Phase II of the Fund we embedded lived experience from the point of receiving funding applications - from shortlisting to assessments to the panel meeting. This was a shift for us. We recognise if you only include lived experience in decision making at the very end of a process, you're asking people to make decisions at a point when a whole host of poor decisions may have already been made. The inclusion of lived experience at this point can be perceived as tokenistic.

## Bringing staff and trustees on the journey

The Global Majority Fund is one of the first times that we've built all these different elements into one programme – to make the distribution of funds faster, simpler, and placing individuals with lived experience at the heart of the grant-making. This approach required buy-in from across the organisation and challenged us to reflect on existing systems and processes. For example, we worked closely with our finance team to lower income thresholds for this programme. We usually do not fund organisations more than two thirds of their annual income as this can place the funded organisation in a precarious financial position when the funding ends. We changed this limit for this fund and built-in additional support for the partner to manage what was, for them, significant funding. This model created by funders that determines organisations with less money should apply for less money needs to change – otherwise we will continue to reproduce inequality with funding efforts. Funders need to be part of the solution in changing this.'

We also needed to review existing due diligence requirements and ensure these were proportionate for applicants to the Global Majority Fund. Not all the organisations neatly ticked boxes in terms of our eligibility criteria. For example, some ITPs had weak governance structures or safeguarding systems... We knew this was because of years of being chronically underfunded hindering investments in this area. Therefore, robust funder plus support was provided to partners to manage the risk and support organisations to grow and develop in addition to delivering a grants programme.

These challenges extended to the organisations that ultimately received funding from ITPs.

*‘We wanted intermediary technical partners to fund the best organisations to respond to communities. These aren’t always constituted groups or groups that have a standalone bank account.’*

It challenged us to think creatively about how to responsibly invest in these organisations – embedding proportionate systems and safeguards as we are accountable as to how funds are spent but balancing this to ensure organisations found these easy to implement and not overly onerous. Not every organisation aspires to be a constituted group or registered organisation and there are limitations to these models that funders don’t often talk about. We know some of the most successful organisations that led effective Covid-19 emergency support in their communities were unconstituted volunteer groups, as it meant they could quickly pivot their activities to emergency response, rather than checking for alignment to charitable objects.

*‘As funders – we need to stop thinking of being unconstituted and unregistered as a blocker to funding these groups and think about how we can best support them. We talk about diversifying income, our systems and processes – why not start having this conversation about diversifying the legal entities and organisation models we are willing to fund?’*

## **Tips for funding organisations led by and for communities experiencing racial inequality and embedding lived experience into decision making**

- **Critically review your processes** – think about how accessible your application process is, who is reviewing applications? What bias might they carry and how might that influence the process?
- **Create a space where external consultants who have lived experience can meaningfully contribute and can provide constructive challenge.** Funders need to begin this journey from a point that we are not the experts – those that we fund are – so we won’t have all the answers and some of our practice may not be suitable or fit for purpose – we need to be open to change. It goes without saying that lived experience needs to be respectfully remunerated always.

- **If you have relationship with established organisations, start there** – it's a good foundation to allow you to be challenged. We've had some really great conversations with Experts by Experience consultants - especially about funding unconstituted groups and how we support unsuccessful applicants! It was fantastic and really pushed Comic Relief to challenge our ways of working. If these consultants were working with us for the very first time, I don't think they would have been comfortable to be so vocal.
- **Have a conversation with your board and finance team as early as you can!** This will be helpful to explore and think creatively about how to mitigate risk
- **Give core funding!** It is key to invest longer term and in a way that is more sustainable for the organisation. It is expensive – both to funder and the funded partner to constantly start and wind down programmes. Consider larger and longer investments – which enables you to create a better relationship with partners, learn from each other and to really begin to make a difference. Unrestricted funding is a lifeline, and we need to remember programmes don't run in silos and the limits on how much funding can be used for core costs can really squeeze organisations as they try to position themselves to be 'fundable', reducing their overheads to be eligible for funding.

## What we are doing next

- At Comic Relief, we have committed to embedding lived experience and participatory approaches to funding calls going forward – endeavouring to make this standard practice, rather than the exception
- We secured funding from DCMS to support Black and minority-led organisations tackling violence against women and girls. We've used a similar model to The Global Majority Fund by embedding lived experience at the start of the journey.
- The campaign group [#CharitySoWhite](#) called on mainstream funders to ringfence at least 20% of funding for organisations led by communities experience racial inequality. We have implemented this across our Change Makers funding call.
- We will be launching Phase III of The Global Majority Fund this year, exclusively for organisations that were supported under Phase I. This funding is to support intermediary technical partners with their longer-term organisational development aspirations and strengthen their grant-making and management practice. For phase III, we are taking our embedding lived experience one step further, by recruiting a paid external Fund Reference Group who will be involved in shaping the fund design, application process and decision making matrices.

# Open and trusting grantmaking

We are calling for funders to adopt more open and trusting practices that make life easier for those they fund. We want funders to make grants in a way that reflects the realities facing charities now and for the foreseeable future.

We worked with charities and funders to design eight commitments to managing grants and relationships in a way that reflects funders' confidence in and respect for the organisations they fund.

Over 100 grantmakers have signed up to our eight commitments to funding charities in an open and trusting way. We hold regular meetings for people to reflect on and develop their practice, and are working on a way for charities to hold open and trusting grantmakers to account.

Find out more about the open and trusting grant-making initiative and how to join our community of open, trusting and flexible funders at: [www.ivar.org.uk/flexible-funders](http://www.ivar.org.uk/flexible-funders)

# Authors and acknowledgements

This case study has been written by Eliza Buckley, based on the research of the author and researchers: Liz Firth, Gilly Green, Keeva Rooney and Folasade Akintola. The insights from this case study contributed to the '[Lets charities shine](#)' report which explores guiding principles for more open and trusting funding applications and assessments.

We would like to extend our thanks to Comic Relief for volunteering their time and thinking on their application and assessments to contribute to this learning.

## How to cite this report:

IVAR (2022), *Embedding direct experience in funding applications and assessments – Comic Relief case study*. London: Institute for Voluntary Action Research.