



**Community  
Foundation**  
for Surrey



# **RAISE Challenge Fund**

**Programme Evaluation Report**

**Helping organisations to achieve  
greater impact**

**RAISE**

February 2018

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# EXECUTIVE SUMMARY

## BACKGROUND AND AIMS

In 2015, working in partnership with the Community Foundation for Surrey, the charity RAISE awarded £116,537 in grants to 13 organisations across the South East of England. The fund aimed to stimulate new and bold activity within voluntary and community sector groups, resulting in positive change across the communities they served. The establishment of this fund was a bold initiative by RAISE. It had not previously been a grant making body but the trustees decided to use the charity's remaining reserves to make a final positive impact on the voluntary sector before it closed.

The funders also wanted to learn from the process and approach taken, to lay the foundations for future philanthropic investment in developing the voluntary sector. As a result, this report is of interest to funding bodies, donors, community and voluntary sector organisations, and advisory and support groups.

Based on extensive interviews, visits and desk research, the report explores whether the fund achieved its aims. These aims were to benefit individuals and communities, support sustainable change, and to test a different approach to funding.

## CONCLUSIONS

The report concludes that the programme delivered tangible benefits, particularly in terms of developing the capability of the funded organisations. Flexible funding to help groups review what they do, change and grow is rare, and demand is high. However, the fund had ambitious aims, and applicants found it challenging to deliver and demonstrate sustainable change and impact on beneficiaries with a one-off one year grant.

## RECOMMENDATIONS FOR FUTURE ACTIONS:

- Foundations should **establish** and philanthropists be encouraged to invest in **strategic development funds** that enable local charities to make the changes they need to strengthen their operation.
- Funders and donors should aim to provide **more long term** rather than one year **funding**, giving organisations the time and resources needed to plan and embed work, and evidence the difference it makes, rather than diverting valuable resources to chasing short term funding.
- Organisations could strengthen their applications and delivery by **taking account of critical success factors** - leadership, self-awareness, and preparedness.
- Funders should ensure their funds are **tightly focused**, with one or two clear aims and examples of the types of activity that might be supported.
- There was a need for ongoing contact between the funder and the funded organisation, in order to maintain momentum and sustain impact within the projects.

# INTRODUCTION

## FUND AIMS

### **IN 2015 THE CHARITY RAISE ESTABLISHED A NEW FUND IN PARTNERSHIP WITH THE COMMUNITY FOUNDATION FOR SURREY (CFS).**

The RAISE Challenge Fund had a number of aims:

- To stimulate and support new and bold activity within community and voluntary groups across the South East of England
- To develop the capability of community and voluntary sector groups
- To achieve demonstrable benefit for the individuals and communities supported by these groups
- To support sustainable change within community and voluntary sector groups
- To test and learn from the process and approach to grant funding

The fund's aims were aligned with RAISE's charitable goals. RAISE worked to support the voluntary and community sector in the South East of England, providing information, advice and connections to help voluntary and community groups be as effective as possible in supporting local communities.

RAISE established the Challenge Fund to use the charity's reserves to invest in the regional community and voluntary sector, prior to closing in 2015.

RAISE partnered with CFS in the development and delivery of the fund, to benefit from the foundation's experience in grant-giving and fund management. Together, the longer term vision was to test this approach to funding, as the basis for potential future philanthropic investment in strengthening the charitable sector.



## GRANT AWARDS

**The fund was launched in mid March 2015, offering grants of between £2,500 and £10,000.**

RAISE had a South East wide remit, and therefore wanted to support activity across the whole region, as far as possible. However, no quota or weighting was applied in the assessment of applications from particular areas.

The type of organisation was considered of less consequence than the activity, as long as it was clearly charitable in purpose and delivering public benefit. This gave the funder more flexibility to progress applications and support organisations that might deter other funders, particularly those newly established, and primarily led by committed individuals rather than a well-established board or committee.

Of the 13 groups supported, 10 were charities, one a community interest company (CIC), one a limited company and one a voluntary group. Most were established but two were new groups. Turnover ranged from less than £10,000 up to just under £600,000 at the time of application, but most were small, with a turnover less than £200,000.



# THE RAISE CHALLENGE FUND AWARDED 13 GRANTS TOTTALLING £116,537 TO ORGANISATIONS ACROSS THE SOUTH EAST, AS FOLLOWS:

## BUCKINGHAMSHIRE

- **£8,520 to Youth Concern**  
to develop a new system to monitor the quality and impact of the charity's services, led by the young people benefiting from local services.

## HAMPSHIRE AND ISLE OF WIGHT

- **£1,600 to Single Parents Support Group**  
to enable this newly established group to receive professional advice and support to guide future development and to support the costs of a new website to consolidate existing webpages and offer a stronger online support community to group members.
- **£9,964 to ORCA**  
to deliver 'Your Seas', a community marine education project, on the Isle of Wight. This included the recruitment and training of new volunteers, bringing people together to learn about and improve their local marine environment.

## KENT

- **£9,157 to Cinque Ports Community Kitchen CIC**  
to pilot a course to teach people who have diabetes to cook from scratch with fresh ingredients so they can effectively follow dietary advice.
- **£5,000 to Whitstable Umbrella Community Support Centre**  
to support a structural review and development to improve and broaden the range and quality of activities for those who experience social isolation due to mental health problems, disability, old age, and socio-economic deprivation.
- **£11,416 to Red Zebra Community Solutions**  
to partner with local GPs to design and develop a new social prescribing model offering a holistic approach to health and wellbeing.
- **£14,467 to Romney Marsh Day Centre**  
to develop, implement and evaluate a pilot scheme to trial an innovative community support package using a combination of GP teleconferencing, tele-health monitoring and tele-befriending to support older, vulnerable adults who struggle with poor access to services and social isolation.

## SURREY

- **£6,600 to Leatherhead Youth Project**  
for a structural review to support and strengthen the organisation's marketing, governance and organisational practice, fundraising and social enterprise growth, as well as local needs research.
- **£10,000 to Elmbridge Rentstart**  
to plan and deliver support to homeless people and to trial a scheme supporting clients securing paid work, helping them to maintain their accommodation and become independent.

## SUSSEX

- **£10,000 to Cancer United**  
to create the first ever gym space exclusively for use by cancer patients, designed specifically to meet their physical and emotional needs.
- **£10,000 to Bluebird Community Partnership**  
to support a merger of three local transport companies to increase sustainability by consolidating experience and resources.
- **£7,650 to Dementia Support East Sussex**  
to create three new support groups in the Bexhill area to establish a network of care-led, volunteer-based activity groups supporting those suffering from dementia and their carers.
- **£12,144 to Amaze**  
to develop a partnership with local group Reaching Families, and trial the potential benefits of a merger to increase organisational capacity and sustainability to better support local families.

## APPROACH

**This report is based on interviews with staff and trustees of the grantee organisations, unsuccessful applicants, staff and trustees of both RAISE and CFS and staff at the South East's community foundations.**

**A list of interviewees is provided in the acknowledgements.**

**The report also draws on a review of the fund guidance, records of the programme kept by CFS, and grantees end of grant reports and supporting documents.**

# FINDINGS: DID THE FUND ACHIEVE ITS AIMS?

## STIMULATING NEW AND BOLD ACTIVITY

RAISE and CFS developed the fund to address what experience suggested the sector needed – positive and creative action to help organisations overcome challenges, unlock their potential and thrive. The RAISE team also drew on their own experience of applying for funding, and conversations with a range of funders to create a fund that was willing to experiment, address gaps and invest in inspirational thinking.

The guidance for the RAISE Challenge Fund presented a series of aims, but made clear that the Fund's primary aim was *'to stimulate new and bold activity within voluntary and community sector groups, resulting in positive change across the communities they serve'*. It strongly encouraged applicants to test and develop innovative ideas, stating that it sought to reward creativity and exciting means of delivery.

It proved difficult for most applicants to satisfy this aspiration, as well as fulfilling the other aims set out by the funder. The fund used a two-stage application process. 320 stage one Expression of Interest forms were received from across the South East. The funder felt that many failed to convince they were trying something new that would result in a genuine shift in their organisation.

As a result, 95% were rejected at stage one, primarily on the basis that they were proposing an expansion of existing delivery rather than demonstrating or aiming for a change in thinking and approach. The RAISE team expressed some disappointment at the lack of applications proposing something *'really untried or cutting edge'*. *'They were not as exciting and innovative as we might have hoped'*.

For some in the sector, the fund's focus on new work was seen as the wrong emphasis:

*'Frustratingly RAISE, like lots of funders, wanted innovation when survival of the most basic services is what is really needed right now and frankly nothing is particularly innovative (or at least within the small amounts of funding on offer)'.*

*'It's not a great time for innovation – most groups are trying to keep core services going'.*

However, the funder never sought novelty for its own sake – challenging the sector to be more creative was intended as a spur to greater sustainability and improved core funding.

**The portfolio of funded projects shows that RAISE funding enabled innovative work across the region. In retrospect, however, more might have been achieved over a longer timescale and it was possibly unrealistic to expect to achieve all the fund's aims in a single year.**



**Cancer United used its £10,000 RAISE Challenge Fund grant to help set-up an innovative rehabilitation gym for cancer patients. Based in Littlehampton, the CU Fitter programme provides physical exercise specifically for people in cancer recovery, personalised to their needs. At the time of application, the project had received a great deal of support in kind and secured many small grants, but was short of its target, so this funding opportunity came at a critical time. RAISE became the second largest grant funder for the project.**

**This is a clear case where the RAISE programme was able to make a significant contribution to new and bold activity – the UK's first dedicated exercise space for cancer patient recovery. With the facility now up and running, the charity is working with academics and medics to build robust evidence of impact to support growth, with plans for a larger new cancer centre in Sussex.**

Bluebird Community Transport's RAISE Challenge Fund grant of £10,000 was instrumental in enabling three existing community transport operators in Sussex – Bluebird, Crawley and Horsham – to merge. Driven by the need to ensure the sustainability of community transport services in the area, the resulting combined operation is more efficient and as a bigger player better placed to tender for and deliver larger contracts and take on new business.

*'The new CIO, Community Transport Sussex, is now providing safe and affordable transport for a third of West Sussex, both in terms of area and population'.*

In east Kent, Red Zebra Community Solutions provides guidance and support for the local voluntary, community and social enterprise sector. The charity applied for funding to help set up a social prescribing model, linking patients with non-medical community based sources of support. The ambition was to work with GPs and health services to build partnerships with the voluntary and community sector, set up a referral and signposting system, and build in robust monitoring and evaluation to evidence impact for future funding. The 'Connect Well' project has so far succeeded in creating a directory of organisations offering around 300 activities suitable for people with health conditions, and has handled over 100 referrals to date. It is not the first time this has been done in the UK, but it is a first for Kent. The RAISE Challenge Fund grant combined with other funding in supporting the research and development needed to get this complex and ambitious initiative off the ground. A key breakthrough for Red Zebra has been developing new relationships with the health sector.

*'It's about embedding change in our organisation – it's helped us learn how to have conversations with health professionals, and also raised awareness of the centrality and importance of local voluntary and community sector provision and activity in improving the health and wellbeing of local people'.*

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**THE GRANT ENABLED US TO DO SOMETHING WE NORMALLY DON'T HAVE THE LUXURY OF DOING – CAUGHT UP IN THE DAY TO DAY. IT'S BEEN A SPRINGBOARD IN OUR THINKING, STRATEGY AND DEVELOPMENT.**

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Romney Marsh Day Centre also sought to tackle the problems of social isolation and poor access to services with its pilot project. The centre used a £14,467 grant to trial a combination of GP tele-conferencing and digital health monitoring and befriending, in partnership with a local GP practice. In common with Red Zebra's experience, the centre found that building sustainable partnerships is key.

The project encountered challenges due to the financial and resource constraints of a single GP surgery supporting the project in isolation. Had the initiative been more widely supported by other local GP surgeries, the project could have achieved more than just 'scratching the surface'. However, the detailed evaluation flagged real potential for further development and wider learning, particularly around more use of video consultations.

As in this case, the common challenge expressed by those involved in delivering most of the funded projects, and especially those trying something new, was that the work took longer than expected.

*'We needed to build in more time – everything overruns.'*

This was an added pressure given that the grant period was for one year, with end of project reporting required at the year end.

*'One year was a constraint. With one year, you can make a start, but it takes longer'.*

*'The project took longer than expected – once we got going we saw the need to follow a logical order, rather than all at the same time, which delayed the other stages'.*

*'One year of delivery was very tight and not realistic'.*

Developing the partnerships involved in delivering collaborative initiatives added to the time pressure -

*'It was a big issue getting the GP to engage'.*

*'It is complex to get the right key people around the table'.*



## DEVELOPING THE CAPABILITY OF COMMUNITY AND VOLUNTARY SECTOR GROUPS

A major part of the change the RAISE Challenge Fund wanted to see was in the capability of charities and voluntary sector groups. This could be developing the skills and knowledge of the group, kick-starting new collaborations, diversifying services, or reviewing and strengthening the organisation's focus, structures and processes. Critically, the funder wanted to see how this would make a difference in the long run, and deliver benefits for individuals and communities.

This was more familiar territory for applicants, and an easier criterion to address, at the same time as offering groups the opportunity to access funds rarely available for this kind of 'behind the scenes' activity.

All the supported groups identified this as a distinction and strength of the fund - the thing that had made it stand out:

*'We have not had other funding like this'.*

*'Infrastructure funding is rare'.*

*'We hadn't found other sources for this work'.*

*'We were looking for funding for this work, it fitted perfectly, there were no other options'.*

*'The challenge is how do you move up a gear, and invest in capacity building, systems and infrastructure? There are very few funders and options for this'.*

Many of the successful groups used Challenge Fund RAISE grants to invest in infrastructural improvements, in one form or another. For some, this focused on improving understanding and demonstration of need, and measuring impact. These organisations recognised that both are critical to proving value and providing stronger evidence to feed into tenders and funding bids.

Youth Concern in Aylesbury used its grant of £8,520 to fund an external consultant-led study of the needs of the young people they work with, and how effectively the organisation is addressing these. This involved trialling different evaluation tools and outcome measures, with clear recommendations on how to develop and embed these. The key issues that emerged - mental health, homelessness and vulnerable housing, and employment - are now steering the direction and focus of the organisation.

*'The grant enabled us to do something we normally don't have the luxury of doing - caught up in the day to day. It's been a springboard in our thinking, strategy and development'.*

The resulting report has also already been used and quoted in numerous grant applications, particularly in support of a major Big Lottery application.



**Leatherhead Youth Project (LYP) supports disadvantaged and vulnerable young people with a team of youth workers and projects based in a dedicated drop-in centre in the town. The charity applied for RAISE funding to undertake a comprehensive review of the organisation's operation at a key phase in its development, with the launch of a new social enterprise café and securing of a contract to expand delivery across the borough.**

**The grant enabled LYP to work with external consultants to review and recommend practical improvements to the charity's governance, policies and structures.**

***'This was an MOT for the charity – what was good, and what needed improving. It allowed us to benchmark our work against other organisations, and learn how to take the best bits of practice and apply it to our work'.***

**LYP also used the funding to undertake the first extensive assessment of the needs of local young people, producing an authoritative report that is helping establish the organisation's leadership in the local area, build partnerships and prepare for larger funding bids.**

New trustees at the Whitstable Umbrella Community Centre were looking for the means to re-visit and clarify the vision and role of the organisation, to focus its impact and improve financial sustainability in the face of dwindling reserves and funding cuts. The Centre used its grant for a development day with the board, professional financial support, fundraising advice and business planning to help move the organisation on. *'At a time when charities doing our sort of work were known to be struggling, we were able to show that we had a concrete plan... This gave our charity strength by showing that we could be resilient'.*

The preparedness of groups and strength of leadership and vision was critical to the success of these applications seeking to develop organisational capability. These groups were self-aware, and actively looking for an opportunity to tackle barriers and progress ambitions. *'The key was to be ready. You had to be quite a long way down the road in your planning for the grant to be appropriate'.* The fund offered the chance to implement plans already in place or in development. Successful applicants commented that the fund was *'the perfect fit at the perfect time'.*

*'We were ready- we didn't just come up with something for this fund'.*

*'We didn't need to shoehorn'.*

In many cases the groups' experience and reporting highlights the value of getting external perspective on the organisation. Working with external consultants and partners seems in each case to have been supportive, insightful and challenging, providing an opportunity to benchmark, and in some instances to inform or steer the board in a way that it can be difficult for staff or management to achieve.

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## THE GRANT FROM RAISE CHALLENGE FUND SET IN TRAIN THIS NEW FOCUS...

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### BENEFITING INDIVIDUALS AND COMMUNITIES

Although the fund's criteria focused on helping organisations move on, and address challenges in creative ways, the funders were also clear that they expected to see how these changes would result in demonstrable benefit for individuals and communities.

The 13 organisations awarded grants support a wide range of beneficiaries, including older people, young people, single parents and their children, people with health issues, those facing social isolation, homeless and vulnerably housed people, and children with special educational needs and disabilities. As a group, the primary focus was on health and well-being.

However, some of the grants had a more direct and obvious impact on beneficiaries than others. For those focusing funding on 'back of house' activity such as structural review, governance and monitoring, the impact on beneficiaries was 'down the line' and therefore harder to anticipate at application stage and then to evidence and quantify in reporting. This was compounded by the challenge of demonstrating and quantifying impact within a short timescale, i.e. one year after the funding.

*'It is not easy to directly demonstrate the impact on the people we work with at this time'.*

*'Outcomes take a long time'.*

*'We have struggled to evidence outcomes data and impact on beneficiaries, especially on this funding scale and with this timescale'.*

Nonetheless, the funding did deliver tangible benefit for the communities and individuals supported by these groups.

This was the impetus behind the grant made to ORCA, a whale and dolphin conservation charity, which were able to offer its environmental education programme to communities on the Isle of Wight for the first time.

ORCA trained 63 volunteers in the local marine environment, who were then involved in beach cleans, shore watches and in supporting school sessions and events.

Alongside this, nearly 2,000 primary school children and 300 secondary school children on the island took part in free dolphin science workshops, and 3000 members of the public attended talks or events. This was a more straightforward but very well received initiative, with extensive community reach in an area that otherwise often misses out.



**Amaze and Reaching Families are both Sussex based charities supporting families of children with Special Educational Needs (SEN) and disabilities. The two organisations had been discussing the potential for working in partnership and possible merger for around six months before RAISE Challenge Fund offered the chance to road-test this with a project to co-produce fact sheets for parent carers. The collaboration began with the two organisations' first joint survey of the information parents and health professionals needed. In response to the findings, Amaze and Reaching Families worked together to produce 40 new factsheets, providing timely and manageable information for parents when they need it, covering subjects including Diagnosis, Education Health and Care Plans and SEN Support in Schools.**

**The benefits of this funded project to families and professionals are evident. More than 1,500 factsheets were downloaded within the first few months, with positive feedback received. 'They really help massively as a parent. Thanks to your factsheets I found out about the Young Carers service – my eldest has just returned from her first young carers camp where she had a fantastic time and a well deserved break'. 'I wish someone had given me this factsheet [Down's syndrome] at the time I was given my son's diagnosis. I felt so overwhelmed....this one page containing everything I needed to know at the time would have been invaluable'.**

**In addition, professionals report that they are using them widely to support and advise parents: 'Excellent range of information that is clear and concise'. 'Addresses the sort of questions parents have often asked me as a professional'.**



The difference that the group singing sessions run by Dementia Support East Sussex (DSES) have made are less quantified and more anecdotal, but around 300 older people with dementia have taken part in 12 new groups as a result of the funding. RAISE trusted and invested in a very small organisation, newly established at the time of the award, and one unlikely to secure funding on this scale elsewhere. DSES has now rolled out a model initially piloted in Bexhill, engaging dementia sufferers in group singing and gentle movement, to care home venues and centres across East Sussex, responsive to growing demand. One carer describes the impact:

*'My mother Sybil, who is slowly losing herself to Alzheimer's, enjoys your Saturday singing group so much, it's amazing to see someone whose ability to function is slowly disappearing, being brought back temporarily with your singing group. To see her sing and remember the words is heart-warming'.*

The RAISE Challenge Fund helped Elmbridge Rentstart plan and deliver support to homeless people in the neighbouring borough of Runnymede, and trial a scheme supporting clients securing paid work. Over the grant period the charity was able to help 21 people secure housing. Of these, six gained employment and six moved from an initial hostel placement into more secure private rented accommodation. In addition, all were supported to develop their financial literacy and eight have joined the charity's savings scheme to help build up a deposit for a property. However, alongside this front-line delivery the organisation point to a more intrinsic longer term benefit.

*'We have supported 21 people who we otherwise would not have reached. However, from an internal perspective the shift is more around the new relationships we now have with landlords and the council which we can continue to build upon'.*

## SUPPORTING SUSTAINABLE CHANGE

Critically, in terms of the assessment of applications, RAISE wanted to support the kind of changes that could make a lasting difference. The team recognised that the one year grant period was a relatively short space of time, and that the funding may be contributing to a longer term process of change within an organisation, but were focused on seeing some on-going benefit.

*'We knew one year was a short time, and it's difficult to secure and demonstrate sustainability in that time, but wanted signs of organisational shift'.*

This was a strong motivation behind the RAISE team's decision to visit and have direct contact with each group as part of the grants process. *'In terms of organisational change and shift, the people in an organisation, beyond the application form, are really important'.* Meeting applicants gave the funder greater confidence in the leadership of each initiative, their level of self-awareness, and how the funding contributed to their longer term plans. However, it wasn't always possible to tease out how broadly the proposals had been shared and discussed across the organisation.

In many of these applications, one or two individuals were key to instigating and delivering the work. This risk and vulnerability was then exposed in a couple of cases, where the loss of that person meant the work stalled and was not shared or embedded in the wider organisation.

*'The project had been planned and put together by one Trustee who had to leave the Board soon after the application was made'.*

*'It was not sufficiently embedded in the organisation. The staff wanted more training and involvement'.*

These experiences point to the importance of sharing the aims and delivery internally to help ensure the impact of the work is sustained within the organisation. A number of funded groups also highlight that working with external partners helped create momentum, and conversely that going it alone undermined impact - *'It should have involved other organisations...this would have made it more sustainable'.*

Alongside having the right people and partners in place, the supported organisations all testify that maintaining momentum and sustaining impact relies on an ongoing relationship with funds.

*'It was a short space of time. The meaningful measures come later, after the project has finished, and we didn't have the resources to do this follow-up'.*

*'It would be good if you could re-visit each organisation towards the end, and back up your investment – an opportunity to get more funding to help implement and embed the work'.*

The short-term nature of this and most funding is a clear frustration: *'Most grants are one year. You have to apply year after year, even when you have evidenced delivery year after year'.*

For some, the fragility of grant funding means this just isn't a long term solution. *'You have to either sell it, or embed it – you can't be reliant on grant funding'.*

Nonetheless, most of the organisations demonstrate the positive impact and legacy from the funding. A number highlight the particular role it has played in unlocking subsequent funding. This has been a part of the change enabled by the grant made to Cinque Ports Community Kitchen in Deal, Kent.



**Cinque Ports Community Kitchen operates as a social enterprise with a mission to support disadvantaged local people to access a healthy diet by learning to cook. The RAISE Challenge Fund supported the organisation's progression from offering generic cookery courses to a focus on courses addressing specific health needs. The grant enabled the organisation to pilot a course for people with diabetes, to help them follow dietary advice and cook from scratch with fresh ingredients.**

**This initial course has helped forge a new direction for the Kitchen, leading to further courses specifically for people with health problems, including programmes for people at risk of heart disease, and for people with mental health difficulties. The staff have worked with a clinical dietician to develop their knowledge and understanding, and built and strengthened relationships with local GP surgeries and health workers, who now refer people onto the courses. The shift has unlocked new funding to support this more health focused delivery, with subsequent funding from Heart Research UK and the BUPA Foundation. 'The grant from RAISE Challenge Fund set in train this new focus on supporting people with specific health conditions'.**

## **TESTING AND LEARNING FROM THE GRANTS APPROACH AND PROCESS**

The small team of staff and trustees at RAISE took a bold and decisive step in establishing a fund for the sector, creating a positive and enduring legacy for the charity. RAISE used a significant portion of the charity's reserves to set up the fund, and invested staff and trustees' time in making the programme as effective as possible. Alongside the ambition to make a positive impact on the sector, RAISE wanted to be 'a different kind of funder'. RAISE had not been a grant-giving body prior to this. Learning from their own experiences applying for and securing grant funding, as well as knowledge of a range of funders, the team saw this as an opportunity to apply a particular approach: A willingness to support groups and activities that would normally struggle to attract funding; some measured risk-taking; and the offer of bespoke support before, during and after the application process to help encourage and embed organisational shift.

Ultimately, RAISE and CFS shared a hope that the fund could make a case for and unlock future philanthropic investment in strengthening small charities and community groups, to help them achieve more.

The RAISE team developed and wrote the criteria and guidance for the fund, supported by CFS, focused on what experience suggested the sector needed – positive and creative action to help organisations overcome challenges, unlock their potential and thrive. Applicants found the guidance detailed but clear. *'The aim of the fund was clear and well described. Good guidance was given'; 'It was very comprehensive, but quite daunting'*. The brief examples of types of activity that might be supported were mentioned as a useful prompt.



## IT'S NOT NORMAL TO GET THIS LEVEL OF SUPPORT...



The partnership established with CFS brought professional expertise in grant-making, including due diligence and assessment. CFS provided the capacity to oversee and administer a major fund, and to see this through monitoring and completion, given that RAISE closed in Autumn 2015. CFS was also able to engage the six other community foundations across the South East, providing region-wide publicity for the fund and shared initial review of stage-one applications.

The fund was launched in mid March 2015, offering grants of between £2,500 and £10,000 to support charitable activities benefiting people in the South East. RAISE elected to use a two stage application process, to shortlist the strongest applications and achieve a higher rate of success at the final decision-making panel, rather than have a large number of applicants spending time working up a full application in a single stage process.

In the first instance, applicants were asked to submit an initial Expression of Interest. Completed forms were routinely 500 to 800 words in length. A total of 320 of these forms were submitted between mid March and the end of May 2015. These were then shared with the local community foundation to complete a basic checklist, establishing whether the foundation knew the group, had funded them, received reporting, and knew of any reason or impediment to supporting the organisation.

The RAISE staff team were then sent and reviewed every application, meeting fortnightly to discuss and agree which to shortlist. Of the 320 initial applications, 17 were shortlisted to progress a full application. This represents a 5% success rate at stage one. For the remainder, RAISE hoped to signpost other funding opportunities, and to help steer good applications that weren't a close match to RAISE towards other prospective funders. In line with this ambition, RAISE did discuss around 30 applications with the Big Lottery and then relayed the Big Lottery's interest to those groups, encouraging them to follow up. In addition, the funding available from community foundations was flagged to unsuccessful applicants.

For example, seven organisations in Surrey that submitted proposals for RAISE funding were subsequently awarded grants totalling nearly £53,000 from other Community Foundation for Surrey funds.

The 17 shortlisted organisations were all offered tailored support by a member of the RAISE team to help them progress their application. For most, this was in the form of a visit and feedback on the draft application. For successful organisations, this was well-received and valuable. In some cases it helped shape plans, improve the clarity of the bid, and increase the amount requested.

However, the follow-up contact with the RAISE Partnership Manager prior to submitting a full bid represented more work and a more in-depth procedure than most organisations were used to, especially in relation to the level of funding available. *'It's not normal to get this level of support...it was a lot of work for the size of grant'; 'It was a bit of a gamble as more time was invested in this'.*

For the ultimately unsuccessful applicants, this dialogue with RAISE represented more work with no return, and raised expectations that the bid would be successful, so that in the end rejection was a bigger blow. *'The support made it worse'. 'We were very disappointed as we had been given indications...that we would be successful...unfortunately this was not the case despite a lot of work refining the bid in line with their suggestions'.*

Care clearly needs to be taken in managing expectations when the funder makes contact with and supports the applicant, emphasising that it remains a competitive process.

“ **FLEXIBILITY FROM THE FUNDER IS SEEN AS KEY – ACCEPTING THAT PLANS MIGHT CHANGE, COSTS VARY, AND THINGS TAKE LONGER THAN EXPECTED.** ”

A panel comprised of trustees from RAISE and CFS made the final decision on applications, drawing on the insights of the RAISE staff team and the detailed assessment undertaken by CFS. 13 of the 17 shortlisted applicants were successful, representing a 76% success rate at stage two. Grantees were paid up front, and then funded organisations were required to submit an end of grant report upon completion, i.e. after one year.

The original intention was that all of the funded organisations would receive further support and a visit to help develop and agree their monitoring after receiving notification of their award. In reality, the timing of RAISE's closure by the end of September 2015 meant that the staff were not able to follow this through. This was missed by some grantees, who had expected on-going contact, having built a relationship with the RAISE Partnership Manager. *'Don't just leave it, follow-up, put in the resource to have an on-going conversation, and ideally someone with expertise'.*

CFS did not have the capacity to deliver this follow-up, much of which would have been out of their area, and this kind of bespoke post-award support was not part of the Foundation's standard process. Therefore, in the end all grantees were issued a standard report template, and post award contact mostly occurred at the instigation of grantees, for example to ask for an extension, or request a re-allocation of funds. Whenever this was requested, grantees appreciated the flexibility afforded by CFS. Given the nature of this funding, flexibility from the funder is seen as key – accepting that plans might change, costs vary, and things take longer than expected.

Not all of the end of grant reports were completed, although all bar one of the funded organisations participated fully in this evaluative study. In those cases where key personnel had left, learning was lost or much more difficult to capture. *'There was a long gap between the grant being given, and the end of grant form. It might be better to have an interim or 6 month report. Not 'preferred', but 'better'.*

A number of grantees found the end of grant reporting onerous. Some found it difficult to provide robust evidence of impact on beneficiaries, and would have preferred more scope and flexibility to focus on the journey travelled and strategic impact in a free-form, narrative format, or to be able to submit existing data or reports. Some found it repetitive, and time-consuming to evidence spend.

*'The level of monitoring felt disproportionate to the size of the grant. It was a level of detail you'd expect for a larger funder.'*

*'Evidence of spend was a bit awkward – we didn't realise this was needed. It was a bit of hassle, and quite hard to evidence some spend'.*

*'I didn't get feedback on it [the report], and would have liked that'.*

The grants process was very resource intensive for both RAISE and CFS, involving a different way of working for both organisations, with many bespoke elements. It was certainly a successful collaboration. RAISE brought funding, impetus, resource and capacity, plus experience of running a charity, fundraising, and delivery of externally funded projects. CFS was a strongly committed and practical partner – able to bring neutrality and flexibility, experience in grants processing, local knowledge and regional reach. Everyone was clear on the aims and their role, the processes were effective and the partnership was focused and cohesive. The desire to learn from this process and the approach that was taken prompted the extensive consultation undertaken with everyone involved with the fund, and this resulting report. The following conclusions and recommendations provide a steer and call to action for funders and donors.

# KEY CONCLUSIONS AND RECOMMENDATIONS

## 1

Most of the grantees felt that the work they undertook would not have gone ahead without this grant. All strongly attested to the difficulty in securing funding to build their capability in particular, and therefore how valuable this was. This programme gave these groups the opportunity to test and invest in the way they operate, with significant dividends, including a clearer focus on need, better evidence of impact, stronger partnerships, and improved ability to secure funding.

**The demand for this kind of ‘behind the scenes’ funding, to help organisations review and improve what they do, is largely unmet. As New Philanthropy Capital recently noted, philanthropists have an important role to play in ‘giving organisations the unrestricted investment they need to plan and develop’, with great potential to become more strategic<sup>1</sup>. This gap and need represents an opportunity for donors to have a distinctive and significant impact on their local charitable sector.**

**Foundations should aim to establish strategic development funds that enables local charities to make the changes they need to strengthen their operation, and in turn delivery and impact.**

**Foundations should make the case for this more flexible and strategic funding to philanthropists.**

## 2

The fund was ambitious in its range of aims, particularly in relation to supporting sustained strategic change. Although much was achieved, proportionate to the size of grants, real change and genuine impact is hard to deliver and evidence with a relatively small one-off one year grant.

**More sustained (i.e. more than one year’s) grant funding would help organisations plan and embed the work, evidence the difference it makes, and save the valuable time and resource continually diverted to chasing short term funding, but is rarely available.**

**Funders and donors should aim to provide longer term funding, ideally for at least two or three years.**

**Alternatively, consider the scope for potential follow-up funding on project completion/towards the end of the year, giving groups the opportunity to bid in for funds to help embed or implement their work. This may be by holding back a ‘continuation’ fund; by prioritising these organisations for funding from the foundation; or by working collaboratively or proactively with other funders to identify alternative sources of support.**



<sup>1</sup>‘Pushing the UK’s Giving Onwards and Upwards’. Sarah Denselow, New Philanthropy Capital, May 2017

## KEY CONCLUSIONS AND RECOMMENDATIONS (CONTINUED)

### 3

The focus on and desire to support new and bold work was ambitious for the fund and sector, especially at a time when many of the small groups this fund targeted are focused on keeping going, meeting need and covering core costs in the face of cuts and growing demand for services. This led to some disappointment in the quality of applications, and made it difficult for groups to deliver what they initially promised within the timescale, and to embed and sustain the work they undertook.

**Funders and donors should consider placing less emphasis on innovation, and more on enabling organisations to tackle the steps they identify as key to helping them move on, enhance their skills and knowledge, and become more sustainable.**

**Funders should build in the means to assess critical success factors for this type of activity: leadership – does the organisation demonstrate vision and ambition, are the board or managing committee behind the plans, who will lead the programme, and who will be involved in its delivery; self-awareness - what's holding the organisation back, and how will this investment help the organisation achieve its aims?; preparedness - is there a clear plan in place, are partners in place, are they ready to go?**

Reflecting these success factors, organisations can strengthen their applications and delivery by developing plans clearly responsive to evidenced need; by allowing more time for the set-up stage, and building in contingency at the end; ensuring that the work has an identified lead, but equally that the aims and plans are shared as widely as possible to help embed them within the organisation; and confirming that partners are clear on the mutual benefits of joint working and their particular roles and responsibilities from the outset.

### 4

It is challenging for groups to articulate and demonstrate impact on beneficiaries at the end of a one year grant when money is being invested in strategic development, and within this timescale. With this fund, it wasn't possible to deliver on RAISE's original ambition to provide follow-through support and contact after awards, capturing the learning along the way and using jointly negotiated and more free-form monitoring and evaluation. This was partly the result of the scale of the programme, which was led by one community foundation but supported organisations across the whole of the South East. The extra capacity the RAISE team provided was removed once the charity had closed after the awards were made. This presented challenges in terms of follow-on contact, and missed the opportunity to use and develop the relationship with supported groups. In the end all applicants were issued a standard written end of grant report template. As some staff/trustees left, and not all grantees completed the lengthy end of grant report form, contacts and opportunities to capture knowledge and impact were lost.

**The kind of reporting funders and donors require should reflect the size and type of grant awarded. For example, evidence of spend could be requested as a special condition rather than as a default requirement, i.e. only if the grantee is not well-known to the funder, it is a larger grant (i.e. over £10,000), or if there is identified risk.**

**Consider use of an interim (6 month) report and/ or phone call, especially if the grantee is not well-known to the funder, it is a larger grant or if there is identified risk. This short one page report could just require bullet points on progress, any issues arising and an update on contacts.**

**End of grant reporting should allow groups to present funders and donors with a broader picture of progress made in achieving the organisation's overall aims, where possible using reports and data already prepared for other funders or stakeholders.**

# 5

The region-wide scope, relative scarcity of this kind of funding, breadth of aims, and the lighter touch stage one process stimulated a very high number of initial applications – 320 in total. The two-stage process is a proven and effective way of shortlisting those to work up a full application, at the same time as achieving good geographic and thematic spread. The RAISE team and CFS invested a lot of time reviewing and filtering Expressions of Interest to save hundreds of organisations from working up full applications that they did not have the funds to support. However, this large number of initial applications resulted in a very low success rate – approximately 5% made it through stage one to stage two, and only 4% of initial applicants received a grant.

The high number of applications, and the patchy quality of these is also indicative of a lot of scatter-gun fundraising from the sector. Many of these applications were not tailored to the fund criteria or responsive to the guidance. This is reflective of the pressure on organisations to find funding, especially for core services, and the limited time they have for this.

**It would be more manageable and effective for foundations to run a programme of this kind on a county rather than regional basis. This would also enable the Community Foundation to use their local knowledge, and build and maintain relationships with all funded organisations.**

**Funders should ensure their funds are tightly focused, with one or two clear aims and succinct guidance, backed up by examples of the kind of work the fund wishes to support. Greater transparency about how applications will be assessed and any factors critical to success could help save applicants and funders time on ill-matched proposals.**



# ACKNOWLEDGEMENTS

Thank you to everyone who gave their time to participate in this evaluation.

## GROUPS

### **Joe Crome**

Leatherhead Youth Project

### **John Griffiths**

Bluebird Community Partnership

### **Marilyn Richards & Naomi Jones**

Whitstable Umbrella Community Support Centre

### **Jan Sheward**

Cancer United

### **Stephanie Hayward**

Cinque Ports Community Kitchen CIC

### **Helen Watson**

Elmbridge Rentstart

### **Fran Borg-Wheeler**

Youth Concern

### **Cliff Slack**

Dementia Support East Sussex

### **Aileen Welch**

Amaze

### **Brian O'Hagan & Sue McMillan**

Reaching Families

### **Jane Caryl**

Romney Marsh Day Centre

### **Charlie Fox**

Red Zebra Community Solutions

### **Anna Bunney**

ORCA

### **Ray Sweeney**

The Disability Karate Federation

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### **Claire Tyrrell**

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“

**RAISE and CFS  
developed the fund  
to address what  
experience suggested  
the sector needed -  
positive and creative  
action to help  
organisations overcome  
challenges, unlock their  
potential and thrive.**

”

# **RAISE Challenge Fund**

## **Programme Evaluation Report**

Helping organisations to  
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