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**Yorkshire Funders & IVAR**

**Aligned Reporting Online Workshop**

**27th April 2023**

**Resources, Considerations & Actions**

**Background**

This session was developed following conversations at the last Yorkshire Common Application Form (YCAF) Task Force meeting and the Does Impact Matter? 28th March Yorkshire Funders’ Online Forum. The Task Force asked: should we try to create a Yorkshire Common Reporting Form to tackle the problem of grant holders having to spend so much time and energy on writing and submitting multiple reports for multiple funders, all with different formats, questions and requirements. Yorkshire Funders works very closely with IVAR (Institute of Voluntary Action Research) and they carried out an Aligned Reporting piece of research pre-Covid.

**If you are interested in adopting the YCAF, you can review the key information here** [**https://www.yorkshirefunders.org.uk/ycaf/**](https://www.yorkshirefunders.org.uk/ycaf/) **and then email** [**carla@yorkshirefunders.org.uk**](mailto:carla@yorkshirefunders.org.uk)**.**

**IVAR Resources**

Ben’s presentation from today’s session is available at <https://www.yorkshirefunders.org.uk/resources/resources-from-events/>

Findings from The Funding Experience Survey: <https://www.ivar.org.uk/publication/get-the-basics-right-findings-from-the-funding-experience-survey/>

Recording of the webinar on ‘trust-based learning’: <https://www.youtube.com/watch?v=WRkbonDvAck>

Framing paper on Open and Trusting reporting: <https://www.ivar.org.uk/publication/open-and-trusting-reporting/>

**Email Ben if you would like to talk to him about any of the above IVAR initiatives** [**ben@ivar.org.uk**](mailto:ben@ivar.org.uk)

**Points for consideration from Ben**

* Covid brought about a ‘new normal’ for many in the funding sector – a simpler, more respectful and more inclusive way of working and this needs to continue. Funding continues to be one of the biggest challenges for all charitable groups and we need to try and change this.
* When it comes to our reporting for grant holders, we should be more proportionate, light touch, and make our communications clear and easy to understand, but even for adopters of IVAR’s Open & Trusting way of working, grant holder reporting is one of the most challenging areas for funders to improve on.
* Funder practice has been shaped by funders and we need to shift this mind-set to make it a more mutually beneficial process between funders and grantees. We need to only ask for information that we need and use and allow grantees to use existing reports (e.g. reports to other funders, annual reports, etc.)
* Focus on: what will it take for this work to go well and how can we remove the obstacles to allow them to do good work? Pay attention ‘upstream’ and think about what you want to know at the outset and before you give a grant.
* Accountability, Impact & Learning – need to be proportionate, but we do recognise that with public money and private donor money there is likely to be a bigger emphasis on accountability so it may be harder to be light touch and this means a ‘common report’ across many funders is probably unrealistic.
* We should be using reports to make judgements about how to improve our contribution to the complex community and voluntary sector eco-system. Ask what’s worked well as well as what’s proved challenging and the improvements they could make.

**Reflections from the first break-out session**

* Remember that funding is a gift and we should treat it as such. We need to reduce the burden we are putting on applicants and grantees, and take more of this on ourselves. If we asked numerous questions at the application stage, why are we asking the same, or more questions at the other end? Consider funding grantees for their reporting time… funders take more time in their own learning by doing visits and seeing the work and results for ourselves. It is in our ability to change this and we need to change our mind-set and make the reporting process fit for purpose. Often funders think they know best, but grant holders do.
* For some funders – particularly those administering public and donor money – reporting is two-fold: for compliance and for learning. We need to be really mindful of the language we use and explain what we mean. Even calling a Monitoring Report by this name sounds like we don’t trust grant holders and that they are being monitored and checked up on. Consider changing the name of your report to make sure you are sending the right signals.
* We have an obligation as funders to collect information to inform our future decisions but the devil is in the detail and the language we use in our reports. The information we gather should be of use to both the funders and the grant holder, and we should be building relationships.

**Reflections & actions from the second break-out session**

* For local authorities the data we capture is used for lobbying and to get more money in the future so it is vital, but we can still try to be a ‘friendly funder’. I will be looking to change the wording of our report from Monitoring to Impact & Learning. We must remember that it’s a relationship between the funder and grant holder, but not a parent and child one. I’ll keep working on embedding change and best practice.
* We came to the realisation that trying to have a common reporting approach could be too hard and instead we can all to try and improve our wording and be more open and transparent – perhaps call it a Feedback Form. Our group is going to try and build on communications and links with grant holders, as well as constantly reviewing our processes. We’re going to keep thinking ahead about what applicants will be facing in the future.
* Getting the balance right between trust and scrutiny/rigour is key – don’t put them up against each other. A big obstacle is when you are the ‘piggy in the middle’, administering the funding on behalf of the government for example and working with the grant holders. This does make it hard to have a standard or common reporting form. We need to talk to commissioners about how funding programmes are designed at an early stage and ensure we get the balance right between learning and accountability. We need to recognise that the ‘wiggle room’ for a local authority isn’t much, but still accept reports in different formats and that have been used for another funders.
* We should only be asking for information that brings to life the work we have supported and avoid repetition. Don’t ask the same questions in a report that we asked in the application form – respect the time of groups. If you ask for photos, be explicit about why you want to see photos and what you will do with them so that the grant holder knows what sort of photos to send. For a Community Foundation, generally these will be used to show what great work the grant holders are doing for the local community and this will encourage donors to give more money to support the work.
* Don’t repeat the scrutiny carried out during the application and assessment process. Once the due diligence has been made and the grant awarded, shift the relationship to a more trusting one. Make the transition to more of a partnership.

**Yorkshire Funders’ actions**

* **Condense this summary document into a ‘Top 10 Tips’ style 1-pager and start to build up a bank of these on various topics and feature them on** [**www.yorkshirefunders.org.uk**](http://www.yorkshirefunders.org.uk)
* **Consider holding an annual workshop focused on grant holder reporting, where participants report back to update on progress made in this area and challenges they continue to face.**
* **Yorkshire Funders to be on hand to local funders to discuss the subject matter further.**