



Yorkshire Funders

Aligned Reporting Workshop

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27th April 2023

Photo credit: Bangladeshi Women's Association
and The Co-op Foundation

IVAR we listen, and
learn together

Agenda

- 10.00 Welcome and introductions
- 10.10 IVAR Presentation
- 10.35 Discussion in pairs; feedback
- 11.00 Comfort break
- 11.10 Discussion in threes; feedback
- 11.50 Next steps

Context: Open and Trusting Grant-making



*Time for a simpler,
more respectful,
and more inclusive
philanthropy.*

The eight commitments

1. Don't waste time

2. Ask relevant questions

3. Accept risk

4. Act with urgency



5. Be open

6. Enable flexibility

7. Communicate with purpose

8. Be proportionate

Commitment 8



Be proportionate

We will commit to light-touch reporting; we will ensure that our formal reporting requirements are well understood, proportionate and meaningful.

**Open and
Trusting:
The charity
experience**



About the Funding Experience Survey

- How do charities experience funding from trusts and foundations?
- What changes to funding practice would most benefit them?
- What difference does it make when charities are funded in an open and trusting way?

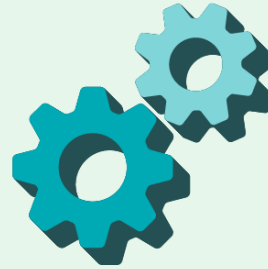


Photo credit: Clean Break

We found...



Charities understand funder constraints and challenges



'How we do things' really matters



Charities know what would make a difference

What does open and trusting funding feel like?

A word cloud featuring various terms in teal and dark blue. The words are arranged in a non-linear fashion, with some overlapping. The largest word is 'Valued'. Other prominent words include 'Honesty', 'Confidence', 'Empowered', 'Belief', 'Adult', 'Transparent', 'Grown-up', 'Freedom', 'Adapt', 'Supported', 'Respected', and 'Dialogue'. Smaller text elements include 'Reduce stress' and 'Less worry'.

Dialogue
Grown-up
Freedom
Adapt
Supported
Less pressure
Honesty
Confidence
Empowered
Belief
Transparent
Valued
Adult
Respected
Less worry
Reduce stress

Get the basics right

10 actions to improve charities' funding experience

1



Offer charities the chance to ask questions before they make an application

2



Have a two-stage application process

3



Be clear about success rates at each stage of your process

4



Don't ask for detailed information until a charity has a good chance of funding

5



Give meaningful feedback to charities whose applications are turned down

6



Give multi-year funding

7



Allow grantees to adapt and change project plans and budgets if needed

8



Give unrestricted funding

9



Only ask for information that you need and will use

10



Allow grantees to use existing reports (e.g. to other funders, annual reports etc.)

Why open and trusting grant-making matters

As a result of open and trusting grant-making, charities are able to:

- Be more responsive to their beneficiaries' priorities
- Be more agile in the light of changing needs
- Focus more energy on mission and outcomes
- Learn and share openly
- Plan more effectively




*Making
better use of
everyone's
precious
time.*

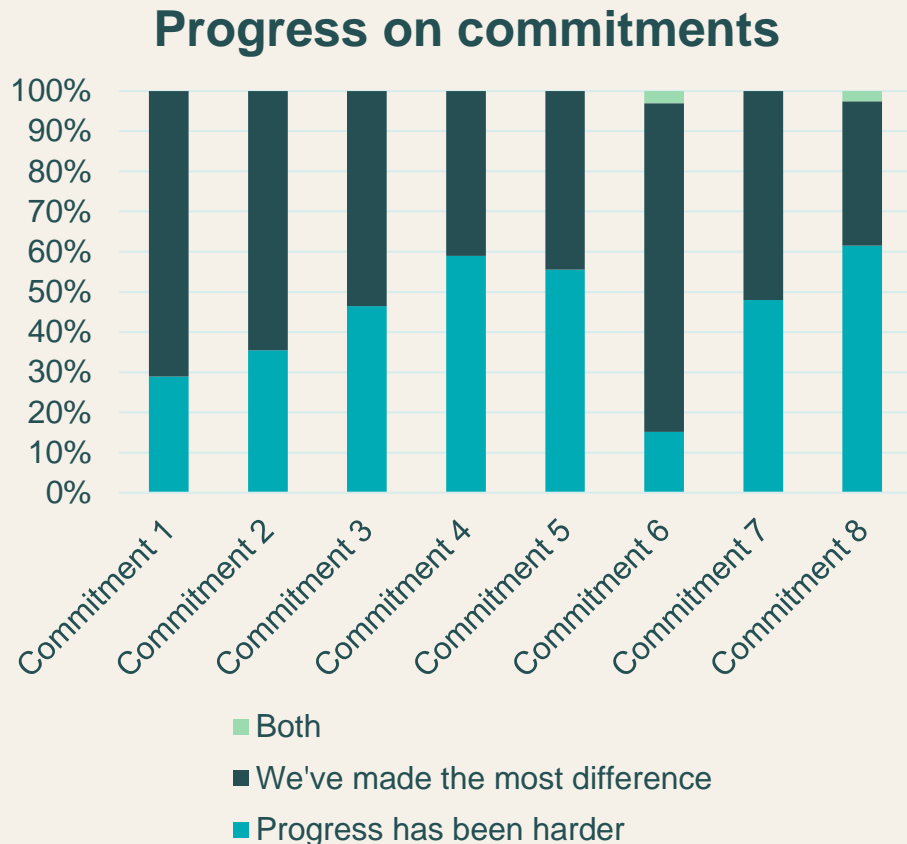


Photo credit: Friends
Provident Foundation

Reporting: Funder practice

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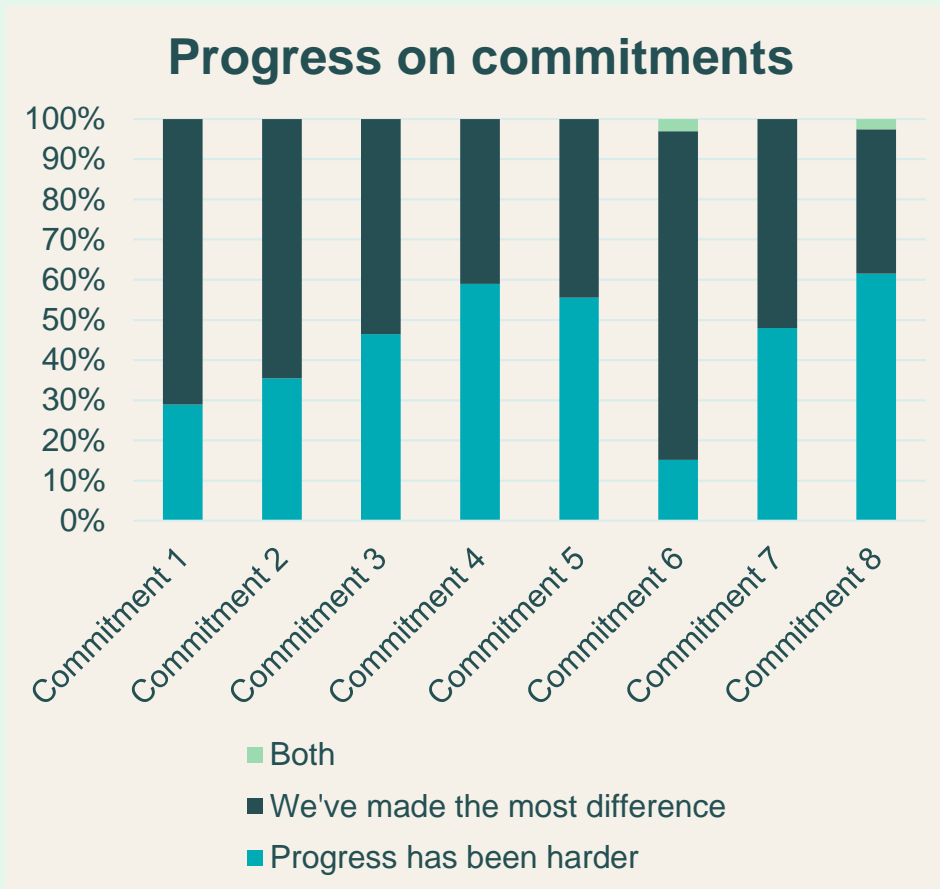
Self-reflection findings - Progress on Open and Trusting commitments



Commitments where funders have made the most progress

- *6: We will enable them to respond flexibly to changing priorities and needs (82%)*
- *1: We will not waste their time (71%)*
- *2: We will only ask relevant questions (65%)*

Self-reflection findings - Progress on Open and Trusting commitments



Commitments where progress has been harder:

- **8: We will commit to light touch reporting (62%)**
- **4: We will act with urgency (59%)**
- **5: We will be transparent about our decisions (56%)**

Self reflection on survey calls-to-action

Survey actions they are 'already doing':

- **Action 1:**
Offer charities the chance to ask questions before they make an application (95%)
- **Action 7:**
Allow grantees to adapt and change project plans and budgets if needed (95%)

Survey actions they are 'interested but not started':

- **Action 10:**
Allow grantees to use existing reports (e.g. to other funders, annual reports etc) (33%)
- **Action 3:**
Be clear about success rates at each stage of your process (21%)

Survey actions that are 'not a priority':

- **Action 2:**
Have a two-stage application process (23%)
- **Action 10:**
Allow grantees to use existing reports (e.g. to other funders, annual reports etc) (20%)

Open and Trusting reporting

The image features a dark teal background. On the left, there is a light green, rounded rectangular shape. A thick teal line starts from the right edge of this light green shape, curves downwards and to the left, then curves back to the right and continues horizontally across the top of the frame.

The purpose of reporting

Accountability:
‘What have you done with this money?’

Compliance, providing assurance to trustees that a foundation’s resources are being used responsibly and in line with the terms of the grant.

Impact:
‘What has been achieved?’

Foundations are far from uniform in their understanding of what ‘impact’ looks like, whose impact they are judging, and what they want to know about it: ‘outputs’; ‘outcomes’; ‘impact’.

Learning:
‘What can you tell us that will help us to do a better job?’

Taking responsibility for thinking deeply about the critical questions that will help you to make informed judgements about how to improve their contribution to the complex ecosystem they inhabit.

What charities think – the best and worst of grant reporting



Charities want grant reporting to be a positive experience – a practical demonstration of the value of standing back, even under the most stressful circumstances, to reflect on what's working well, what's proving challenging and the improvements they can make.

Five key messages about what funders can do to help

1. Reduce the collective cost of reporting

2. Respect the demands on staff and service users

3. Be clearer and more transparent

4. Pay attention to the funding relationship

5. Be more flexible about how and when reports are made

Six principles to help funders of all types improve their practice

Getting started

- **Be rigorous:** Take the time to agree what you need, why you need it and how you will use it
- **Be realistic:** Reporting alone cannot answer strategic questions about 'what next'

Moving to design

- **Be respectful:** Do everything possible to lighten the burden
- **Make it useful** to charities, not just to foundations
- **Allow greater choice** in how and when reports are made

Communication

- **Be explicit:** Minimise the risk of confusion or second guessing by listening and responding to the needs and preferences of your grantees

Discussion and reflection

The image features a dark teal background. On the left, there is a light green rounded rectangular shape. The text 'Discussion and reflection' is written in a bold, dark teal font within this shape. To the right of the light green shape, there are two thick, light teal lines. The upper line is horizontal and has a rounded left end. The lower line is also horizontal but curves downwards and then back to the right, creating a large, open, rounded shape that overlaps the bottom of the light green area.

Discuss the purpose and current practice of reporting

- What is the overall purpose of reporting within your foundation?
- Is your reporting practice aligned with that purpose?
- On a scale of 1-10, is your reporting practice:
 - Proportionate (to the size of grant and grantee)
 - Meaningful (in terms of if/how you actively use the reports)



In pairs, for 15 minutes.

Taking the six principles as your starting point

- What are the obstacles to being more open and trusting?
- What could you do to overcome them? Each group to feed back three actions.



In groups of three, for 20 minutes.



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