



Oxfordshire Racial Equality Council



Empowering BME Communities in the South East



Oxfordshire Community and Voluntary Action

The Report on The Oxfordshire Fund Raising Workshop for Small Organisations working with BME Communities

Held on Wednesday 11th February 2009

At the Poughman's room,
Oxford City Town Hall, Oxford

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Uni Network Coordinator

18th March 2009

ChangeUp

capacity
builders

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1. Executive Summary

On Wednesday 11 February 2009, The Oxfordshire Racial Equality Council (OREC) in collaboration with the Uni Network (South East England BME Network) and the Oxfordshire Community and Voluntary Action (OCVA) organised a one day training workshop tagged "Fund Raising for small organisations working with BME communities" at the Oxford Town Hall. The workshop had a good attendance of 25 participants, including 14 representatives from 10 frontline organisations working with BME communities. (See Appendix I).

This report captures the outcome of the workshop aimed at meeting critical fundraising needs of most frontline organisations working with BME communities in Oxfordshire. The workshop created the environment for key funding organisations such as the Big Lottery Fund, Heritage Lottery Fund, the Oxfordshire Community Foundation, and the Oxfordshire City Council to guide frontline community groups on the fundamentals, strategies and techniques for making successful funding applications. The overall aims of the day were to give the participants:

- An understanding of good practice in making a good grant application
- Greater familiarity with what funders are looking for and their priorities
- Increased knowledge of where to look to find funding opportunities
- Increased knowledge of how to develop an effective fundraising plan and to design successful fundraising strategies
- An understanding of a broad range of fundraising approaches/techniques

Hillary Burr, the Community Development Worker with OCVA provided information on where groups can get local helper-agency support, how to develop fund raising plans and strategies, filling funding applications, sourcing for funds and other issues. Speakers from funding organisations made presentation on their guidelines and criteria used in judging various categories of grant applications. They highlighted a number of errors applicants make while filling applications and gave practical tips on the ingredients that make a successful application.

The meeting was highly interactive with enthusiastic participants raising questions and concerns about their challenges and bad experiences faced during past application processes. The quality of answers and solutions proffered by the funders provided an eye-opener to most participants on how the 'process works' and some simple mistakes often made while filling the forms. Feedback received from both frontline organisations and funders confirmed that the workshop was successful and met the needs of the organisations present.



2. The Background

The workshop was organised in response to organisational skills gaps identified during a series of skills audit exercises and consultations with some BME frontline organisations in Oxfordshire in 2008. In September 2008, skills audits were carried out by Uni Network Coordinators (Tayo Owodunni and Ali Abdoul) with support from skills-audit trained OREC staff (Sarah Moran). Further consultations and assessments with BME groups by the New OREC Improving Reach Outreach Worker (Aggie Kalungu-Banda) between November 2008 and January 2009 also highlighted the desire of frontline groups for training in fund raising.

Thereafter, plans were crystallised between, OREC, Uni Network and OCVA to invite some key funding bodies to train BME organisations on fund-raising essentials in February, 2009. OREC'S Project development officer; Jolanta Babiuch-Luxmoore was took the lead in developing the programme. For the Event Programme, Terms of Reference and Flyer for the Programme see Appendix II, III and IV respectively)

3. Introduction

The day opened with a welcoming address from Patrick Tolani, Director of OREC. He highlighted the importance of helper agencies like OREC, Uni Network and Funders like the Big Lottery and the Community Foundation helping small BME organisations become more successful in raising funds to achieve grassroots projects that directly impact on BME communities. He expressed high hopes that at the end of the day all the groups present would fully understand the “why, what, how, where, and when” of putting in successful funding applications



The facilitator, Aggie Kalungu-Banda set the tone for the day by asking participants to reflect on why they came to the workshop, and what they hoped to take away at the end of the day. Everyone was given the opportunity to say what their hopes and expectations for the day were. Some of the responses received are listed below:

- ✓ To acquire skills on fund raising
- ✓ To know the funders criteria for giving grants
- ✓ To know where to get funding
- ✓ Be well trained and develop skills in this area
- ✓ how much to apply for and when to apply
- ✓ to share learning and improve understanding on the issue of funding

To maximise the packed programme for the day and ensure that participants got the most of the event, the workshop was arranged into three sessions. The first session led by Hillary Burr focused attention on how to develop strategic thinking in fundraising. Session 2 was principally a donor panel on criteria used by funders to judge applications. Session 3 came up after lunch with Big lottery giving a presentation on how their application process works and the different streams of funding that exist within different arms of UK Government’s National Lottery programme.

4. Session 1: Thinking Strategically in Fundraising

In the first session, Hillary Burr explained to the groups that OVCA with its relatively new Community Development Team in post, the OCVA is now positioned to assist groups in a variety of ways including fundraising assistance, planning and training. In a role-play exercise and group discussion to aimed at guiding the audience into thinking about why they need to

develop clear fund raising strategies and organisational brand, she asked the participants to “...imagine a scenario where by a stroke of good luck, you found yourself in a lift with the grants officer of a major funder and you have just 3 minutes to convince him of your need for funding, what you would say?” After listening to a lively discussion on the topic, she emphasized that groups must discover their brand and uniqueness, be clear about who they are and what they do so they can target the right funders that suit their objectives. She encouraged the organisations to match funders to their organisational goals and to go for only those funds that enable them achieve their set objectives. She stressed the need for fund applications to provide good evidence of need and to be absolutely sure of the benefits that their projects hold for their beneficiaries.

Hillary underscored the importance of having a strategic business plan which can be a three year plan or even longer. Planning, she said, helps groups to focus, understand resources available and areas of need. It makes the organisation understand where its money comes, how it is spent, and how much they require achieving specific aims. She highlighted the importance of volunteers and advised voluntary sector organisations to put a financial value on volunteers including committee members using minimum wage hourly rates. Hillary urged organisations to keep good financial records as well as volunteer time-logs.

Hillary ended the session by recommending that small organisations develop diverse funding streams and not rely too much on only one funder or financing source. Some other finance sources, she highlighted are: contracts, entering into service level agreements, tendering and commissioning projects. To finish, she appealed to the groups to make use of OCVA's fund finder software as well as seeking help from OCVA, OREC or Big lottery Advice/Help lines. Participants were given opportunities to ask questions intermittently during the session.

5. Session 2: Donor Panel

The donor panel session provided a unique opportunity for invited funders namely; the Oxfordshire Community Foundation, Heritage Fund, and the Oxfordshire County Council to each take turns to highlight their funding programmes, criteria and process. It also gave direct access for the frontline BME groups to question each funder about barriers and challenges they faced during past applications and to seek explanations to the problems they encountered.



Oxfordshire Community Foundation - Barry Tanswell, Chief Executive Officer

First on the 'Hot seat' was Barry Tanswell, Chief Executive Officer of the Oxfordshire Community Foundation. He informed participants that the foundation received 250 million pounds that must be disbursed as grants within the next 3 years. The funds were available to any applicable Oxfordshire-based community organisation having less than £30,000 income per annum. He explained that the foundation's criteria were one of the easiest to sail through, because it is not compulsory that applicants be registered or possess charity status. All that is required is for the organisations to be volunteer-led, exist for at least one year, and possess basic terms of reference, a constitution and a separate bank account. Another basic requirement the foundation requests for is a reference from a recognised affiliate organisations as proof of credibility and integrity.

Barry informed the groups that the foundations applications review panel sits every two months (six times a year). He advised interested groups to visit the website: www.oxfordshire.org.uk to download application forms. He explained that the Community Foundation only gives money for specific aspects of a sustainable project that clearly shows benefits to local people. He then answered a series of questions from most of the frontline organisations.

Heritage Lottery Fund - Sarah Wicks

The second funding organisation in this donor session was Heritage Lottery Fund, represented by Sarah Wicks. Sarah introduced the Heritage Lottery Fund and handed out brochures of the different funding packages available from Heritage Lottery Fund. She informed participants that the Fund received 4.6 pence per each pound from all National Lottery tickets sold. She emphasized that Heritage Fund only funds projects that have sustainable, heritage-value and outcomes that are desirable to be passed unto future generations. Some of its funding themes target youth activities



such as the 'Your Heritage and Your Roots' programmes which aim at encouraging young people to understand and appreciate their heritage.

A major factor the Heritage Lottery fund considers when granting application is the need for projects to provide evidence that the project gives opportunity for heritage learning rather than just the thrill of an event experience. She advised participants to visit their website: www.hlf.org.uk for more information and to download application forms. Sarah gave statistics of the fund's achievements over the past 15 years and said that 220 million was available for disbursement this year. She expects that after workshops like this, more BME organisations will put in applications for this year's grants. Answering questions on funding core cost, Sarah clarified that the Heritage fund does not pay for core running cost or revenue cost for projects; neither does it sponsor purely cultural or sport events that have no heritage learning involved.

The Oxford City Council - Hillary Burr of OCVA representing Julia Tankins

The Oxford City Council was last in the hot seat. Hillary Burr of OCVA stood in the gap for Julia Tankins the officer in charge who could not attend. She guided participants through the process of filling in the City's grants application. She explained that there were different categories of funds from small grants of £750, Arts development fund, Emergency grants for natural disasters like flooding, up to Area Committee grants based on Area plans(with no upper limits). She advised any group interested in area grants to ensure they are versed in the local area plan and the areas of work being focused.

Most participants questioned the City's application process, its bureaucratic and complicated forms and the short period of time available to put in applications. The groups unanimously advised the city to make their application process more inclusive for it to reach out disadvantaged communities.

6. Session 3: Having an Outcome focus approach during the funding application process by Big Lottery Fund

After handing out packs of Big lottery brochures, BLF representatives, Louise McGrath and Pat Cook opened Session 3 with a presentation titled: 'Bringing about real change to communities and to lives of those most in need'. Some of the topical questions explored in the presentation covered:

- ✓ **How Each Lottery Pound is Spent?** – Camelot (0.5p), Prize money (50p), Taxes (12p), Retailer (5p), Administration (4.5p), Good Causes (28p)
- ✓ **Who Distributes 'Good Causes' Money?** – BLF, Arts council, Heritage Fund, Sports England, Awards for All, UK Film Council, etc
- ✓ **BLF Funding Approach and General Policies** – Outcomes focus, Full cost recovery, easy access, 60-70% VCS undertaking, adding value to Govt. Funding, 5-year funding, sustainability
- ✓ **Examples of BLF Programmes** – Awards for All, Reaching Communities, Changing Spaces- with 5 broadly environmental programmes
- ✓ **General Advice on Applying for Funding** – How to use criteria to target right programmes, Showing evidence of need, Being clear of outcomes, consulting local

communities, demonstrating capacity to deliver, and seeking Helper agencies for advice

- ✓ **Evidencing Need** -Being able to establish community need, issues and how you will meet those needs
- ✓ **Ways and Methods of Proving Need** – meetings, surveys, waiting list of service users, proof of gap in service provision, statistics, link to local strategies, evaluation/ focus groups
- ✓ **Outcomes** – what change or difference will the project make? Having SMART outcomes that tie into BIGs outcomes
- ✓ **Common Reasons for Sending Back Applications (Awards for All)**- light touch programme, basic errors, missing information, mismatched project, weak outcomes, lack of evidence of need, retrospective funding, no further information, excluded items, deficient constitution and inadequate financial controls
- ✓ **Reaching Communities (South East) Common Reasons for Rejection at Outline Proposal Stage** –Out of 513 reject reasons, lack of SMART outcomes account for 140, Un established Evidence of Need account for 68, Inadequate involvement of local community is46, Inadequate link to local plan is 43
- ✓ **Success Stories** – High demand for funds/ strong competition, over £65 million distributed for good causes last year in the South East alone. Projects bring real change to communities and to the lives of those most in need.
- ✓ **Useful contacts** – www.biglotteryfund.org.uk , advice line: 08454102030; www.awardsforall.org.uk, phone:08456002040, Textphone: 08457556656; changing spaces advice line: 08453671671, textphone: 08456021659

The BLF representatives informed the participants that Awards for All grants will change its application process from the current format from the 31st of March 2009. New format for Awards for all will be launched and announced before April, 2009. They also declared that the Reaching Communities programme's priorities hinge on 4 main themes;

- Health and Well being (particularly mental health)
- Community Cohesion and increasing inclusive community participation
- Improving Learning
- The Environment



After the presentation, Louise and Pat answered questions from the audience and gave success tips on how to evidence needs, obtaining information from local council websites, national indicators, national statistics, recent case studies and research work done locally. They advised the groups to visit the Reaching Communities website for various resources like the Equitech evaluation toolkit.

7. Evaluation of workshop

Workshop evaluation forms received showed generally highly positive remarks from participants about the outcome of the training. Even though programme tightly packed and lasted a whole day, majority of participants stayed all through the three sessions. The quality of knowledge and guidance provided by guest speakers / funders was judged high. The responses on the evaluation forms indicated that only one of the participants was dissatisfied with the workshop programme. The rest of the participants' responses were either very satisfied or satisfied about the programme's relevance, the facilitation and the materials. Out of eleven evaluation forms returned, nine were very satisfied with the programme, eight gave very satisfactory remarks for the training materials, while eight rated both the workshop programme and the materials very satisfactory.

A few of the new learning highlighted by the respondents include:

- ✓ New knowledge of various projects and different funders to consider
- ✓ It helps when one knows who to approach for what kind of funding and what time is best to send in applications
- ✓ Understanding criteria used by funding bodies
- ✓ Where to seek available help for small community groups e.g. OCVA
- ✓ Direct contact with funders and contact details for more information
- ✓ All details learned from the organisations presenting was mostly new information

When asked how they intend to use this new knowledge, some of the responses were:

- ✓ With the full explanation, I now understand what funding bodies are looking for
- ✓ I will certainly look for application forms and apply new lessons on planning which was particularly helpful, although I think more could have been said on that
- ✓ More Fundraising
- ✓ Apply for funding to different streams I am now aware of
- ✓ Start apply for funds again and get OCVA's help in filling forms
- ✓ Use the knowledge for future grants for future programmes
- ✓ To use the information to support the group I represent
- ✓ To make sure that in future my group can use the skill I have acquired today to raise funds. I will be in a position to encourage some of our members on how to fill application forms correctly.

On suggestions for future training programmes, some suggested:

- ✓ This has been an example of OREC identifying a need and addressing it. This way OREC is really relevant to BME communities. Next time more time could be given

for discussions and presentation. Information today was rushed. However well done!

- ✓ More sessions on how to fill application forms and bringing the actual forms would have been useful
- ✓ I would like to attend future programmes
- ✓ No further suggestions, but that other funders send information in advance perhaps, many thanks!
- ✓ It would be great if we have more future trainings in relation to application filling.



7. Conclusion and Recommendations

Observation of the high turn-out from hither-to considered “hard-to-reach” BME groups in Oxfordshire proves this assumption to be wrong and baseless. The success recorded by this workshop’s approach by all stakeholders underscore the importance of grassroots outreach-work and relationship-building with disadvantaged groups. It is evident that many groups will gladly accept help from genuinely concern helper agencies. Proper planning and collaborative partnership-working between OREC, Uni Network and OCVA right from the Skills audit stage, project planning and implementation stage paid off.

This pilot partnership between a regional network (Uni Network), a local area lead agency (OREC) and mainstream CVS (OCVA) to run a qualitative, needs-based training with the involvement of key national funders like BLF and Heritage Lottery Fund and local funders like the Oxfordshire Community Foundation and the Oxford City Council grants have provided an good practice for other similar partnerships in other areas.

The enthusiasm for learning and developing new skills expressed by participants at this workshop should the followed-up on and harnessed to develop other areas of weakness and to plug any identified skill-gaps and lack of capacity.

Helper agencies are encouraged to reach out to more frontline organisations and develop stronger ties with them. There is need for more ‘hands-on’ guidance, assistance and administrative support to help these groups secure needed funding. Local helper agencies should also endeavour to try brokering local area partnership-working between groups, encourage peer-learning and review, as well as create networking opportunities.

APPENDIX I: PARTICIPANTS LIST

Participants name	Name of Organisation
1. Mr. Alam 2. Mr. S.M. Haque	Oxfordshire Community Forum
3. Mr Vesudevan	Oxford Malayalee Club
4. Nick Ndebele	The Focus Trust (Banbury)
5. Siuli Kadir 6. Rubina Khan	Oxford School
7. Filda Mary Abelkec- Lukonyomoi 8. Florence Wilson 9. Grace Rwotlakica	BK Luwo
10. Jemila Azad	Roshni Asian Women Association
11. Junie James	African & African-Caribbean Kultural Heritage Initiative
12. Mary Nnankay	Banbury District Racial Equality Council
1. Jennifer Toban	Community Champions
14. Adame Adekoya	Word Fountain Church
15. Endah Paton	OREC
16. Tayo Owodunni	Uni Network
17. Patrick Tolani	OREC
18. Aggie Kalungu-Banda	OREC
19. Mehrunissa Khan	Uni Network
20. Hilary Burr	OCVA
21. Louise McGrath	Big Lottery Fund
22. Pat Cook	Big Lottery Fund
23. Sara Wicks	Heritage Lottery Fund
24. Barry Tanswell	Oxfordshire Community Foundation
25. David Bates	OCVA

APPENDIX II: PROGRAMME

OREC, Uni Network and OCVA Training Workshop

**Fundraising for small organisations working with BME communities:
*fundamentals, strategies and techniques***

Wednesday, 11th February 2009, 10:30-14.00

The Ploughman's Room, Town Hall, St Aldate's, Oxford OX1 1BX

Workshop outcomes:

The workshop should result in participants having:

- An understanding of good practice in making a good grant application
- Greater familiarity with what funders are looking for and their priorities
- Increased knowledge of where to look to find funding opportunities
- Increased knowledge of how to develop an effective fundraising plan and to design successful fundraising strategies
- An understanding of a broad range of fundraising approaches/techniques

PROGRAMME

9.30-10.00	Registration and refreshments
10.00-10.30	Welcome by Facilitator Opening remarks from OREC and/or OCVA
10.30-12.15	Session 1 Thinking strategically in fundraising <i>Half hour to 45 minute presentation by external speaker TBA</i> <i>Q&A and group discussion with BME Third Sector participants</i>
12.15-1.15	LUNCH
1.15-3.15	Session 2 Donors panel: donor criteria and expectations
3.15-3.25	BREAK
3.25-4.10	Session 3 the Funding application process (led by Big Lottery)
4.10-4.30	Wrap up/closing remarks by OREC and/or OCVA

APPENDIX III: TERMS OF REFERENCE

OREC, Uni Network and OCVA Training Workshop

Fundraising for small organisations working with BME communities: *fundamentals, strategies and techniques*

Wednesday, 11th February 2009, 10:30-14.00

The Ploughman's Room, Town Hall, St Aldate's, Oxford OX1 1BX

Terms of Reference

The aim of the workshop is to share information and advice on fundraising. The workshop will be organised by the Oxfordshire Racial Equality Council and OCVA in collaboration with UNI Network.

During the workshop, representatives of small organisations/groups working with BME communities will have an opportunity to meet funding organisations such as the Big Lottery Fund, Oxfordshire Community Foundation and City Council Grant's officer as well as The Midcounties Co-operative. All of the representatives of funding organizations will present their criteria for granting funding applications and their priority areas.

Participants of the workshop will be given the opportunity to express their concerns and needs regarding funding. Participants will also have the chance to network and have one to one advice about fundraising strategies.

Expectations from the fundraising organisations:

- To respond to the concerns and needs regarding funding for BME groups
- To provide information on the funding opportunities and priorities they have
- To raise awareness on the need for BME groups to have funding strategies
- To provide guidelines on preparing funding applications based on evidence needs and outcomes

Workshop outcomes:

The workshop should result in participants having:

- An understanding of good practice in making a good grant application
 - Greater familiarity with what funders are looking for and their priorities
 - Increased knowledge of where to look to find funding opportunities
 - Increased knowledge of how to develop an effective fundraising plan and to design successful fundraising strategies
 - An understanding of a broad range of fundraising approaches/techniques
-