

Bright Project

***Audit and Fundraising Strategy
to
further understand the
requirements and funding needs
of
BME Rights and Advice Organisations
in
Bristol & South Gloucestershire***

Funding Strategy

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October 2009

A funding strategy for BME rights and advice organisations in Bristol and South Gloucestershire

Aims

This strategy has been developed to assist in improving the quality of services delivered by BME rights and advice giving organisations in Bristol and South Gloucestershire. It is based on the findings of an audit and mapping of current provision, together with an analysis of external challenges and opportunities facing the sector.

The strategy addresses the development and funding needs identified by individual organisations in the sector, but also considers ways in which they might work together to access funding in the future.

Sector analysis

The audit revealed a sector that provides a flexible, immediate response to the needs of local communities in a way that is highly valued by its users. In many instances it provides a 'gateway' to mainstream services, and often goes beyond that by providing support and advocacy services in subsequent dealings with officials. Often, though, it provides the advice and rights information that is needed, without need for onward referral.

While some organisations have an explicit advice and rights giving focus, the remit of others is of a broader, more generally supportive nature. However, in the case of the latter, in practice service users come to them for information and advice. Service users often come with multiple issues and build up a relationship with staff over time, perceiving the emotional support that they receive as a vital element in the quality of service.

Translation of documents and interpreting in meetings with officials is undertaken by many organisations. Advocacy is another important element of what is provided. Even for those for whom spoken English is good enough to communicate without a translator, the presence of someone who can articulate their situation clearly and negotiate with the authorities on their behalf is appreciated.

However, these services are provided by a sector operating on minimal finances, with a committed staff and volunteers stretched to and beyond capacity. Particular challenges revealed by the audit include:

- A high proportion of staff are part-time and volunteers make a significant contribution to service delivery. This has implications for organisations' capacity to attend training or networking events, and for service development.
- Most operate on a budget of less than £200,000, and most are experiencing reductions in funding and a consequent loss of posts and services.
- Fundraising tends to be reactive to funding opportunities, which is time-consuming and reduces the scope for strategic planning.
- There is a heavy dependence on local authority funding streams, and some concern that these will be reduced in the current economic climate.
- Fundraising was identified through the audit as a key training need, followed by developing a fundraising strategy and business planning.

- The sector is under-represented on key strategic boards, both in their communities and in the advice sector across Bristol and South Gloucestershire. This is felt to have implications for its ability to access funding opportunities.

External challenges and opportunities

Financial climate

The recession is impacting on the sector not only in terms of funding that is available to it, but also in terms of demands on its services. In addition to those who have always sought their advice, there are now people who have recently lost their job and cannot pay their bills. However, there is recognition that the current economic climate may lead to the creation of new funding streams for the worst affected, and that it will be important for small organisations in the sector to make themselves ready to grasp any such opportunities. A paper relating to possible funding sources and where to find out more is attached as an Appendix to this strategy.

Government policy

Collaboration has received considerable national impetus through some key government policy developments affecting the voluntary and community sector. Collaboration can range from informal networking, through consortium tendering, joint ventures and co-locating, to acquisition and merger at its most formal. Increasingly in the current climate, organisations may need to consider how collaboration in some form can reduce costs, improve efficiencies, and secure funding for future developments.

Joint funded and integrated advice services

The Legal Services Commission (LSC) is keen to develop joint funded and integrated advice services, on the basis of research that shows that clients experience clusters of problems across category boundaries. Fragmented services are thought not to support people in resolving these. The local authorities in Bristol and South Gloucestershire have not as yet committed to entering such an arrangement. While the LSC believes that BME organisations could play a part in this kind of single contracting arrangement, the organisations themselves are concerned that many of them would be excluded and the diversity would be lost.

The race equality duty and procurement

Public bodies have been placed under a statutory duty¹ to eliminate unlawful discrimination and harassment and to promote race equality. The Equality and Human Rights Commission (EHRC) points out that the public sector spends billions of pounds each year on procurement and has been working with the Government Equality Office and Office of Government Commerce to reform the Pre Qualification Questionnaire used in public sector procurement and to develop clear equality standards.

Demographics

The BME population of Bristol and South Gloucestershire is an ever-changing landscape. It is often people who are new to the country who use the services of the sector, and language and cultural familiarity is often critical. In this context, it will be

¹ Race Relations (Amendment) Act 2000

important to be alert to the needs of new communities, such as the Romanian Roma community, who have a history of persecution, and particular faith and cultural issues.

Priorities and actions for attracting and focusing funding

Expanding reach

In order to ensure that it reaches elements of the sector who are supporting new communities, Bright will review its current database and set in place a mechanism for regular review, so that new communities and the organisations that serve them are included in its remit.

Clarity

Organisations within the sector vary enormously in the extent to which advice and rights is a core function, and the range of other activities that they undertake. Clarity is needed in relation to where each fits within the continuum (below), since key issues such as training needs, quality standards, and potential for collaboration with other organisations flow from this.

| Core function | Part of wider remit | Not a function | |
|--|--|---|---|
| Advice and rights the sole or principal role of the organisation | Specific advice and rights services provided as part of a wider range of support functions | Advice and rights work undertaken only informally as part of support function | Refers all requests for advice and rights to other agencies |

The database of organisations should be sub-divided by these categories so that Bright's support and development activities can be targeted appropriately.

Quality standards

The LSC Quality Mark is important for any organisation whose sole or principal role is the provision of advice or rights information. It provides evidence of quality assurance to funders and reassurance to clients. However, it is an onerous process, requires the maintenance of systems and procedures to produce evidence of these, and is costly. For organisations providing advice and rights information only as part of a wider range of support functions or only informally as part of a support function, it is unlikely to be either necessary or relevant. Other quality standards such as PQASSO or Customer Service Excellence (the successor to Charter Mark) are likely to be more appropriate.

Bright will undertake an assessment of the options for quality standards and agree with each organisation the appropriate one for them, and support them in achieving this. Support will be given as a priority to those for whom the LSC Quality Mark is the most relevant. For the others, a training and development plan (with a timetable for delivery) will be devised in order to assist them in the process of identifying and obtaining a quality standard commensurate with the services they provide.

Positioning the sector

Many BME organisations feel excluded from the decision-making processes involving local authority funders and mainstream advice and rights organisations. There is a lack

of trust and a concern that, especially in the current economic climate, any funding that is available may not be accessible to them. Bright is in a position to promote membership of ACFA, and assist those BME organisations whose time constraints prevent them from attending meetings by representing them there. Bright will also use its place at the Joint Planning Board to ensure the views and needs of the sector are represented in meetings involving the local authorities. It will seek opportunities to present the achievements and needs of the sector – as identified through the audit – as widely as possible.

In particular, it will be important to use opportunities to join the debate about any potential arrangements for single contracting of services. Bright will engage in this debate on behalf of the sector, while helping BME organisations to be ready to be a part of any such arrangement, should it be introduced.

Collaboration

BME organisations will need to consider ways in which collaborating with each other and with mainstream advice and rights organisations could help them to improve and develop their services; reduce their costs; and have a more powerful voice on behalf of their communities. In particular, there may be advantages for organisations working on behalf of women and newly arrived communities to explore common needs and interests, or for finding new ways of working with mainstream providers to deliver sessions (for example at satellite community locations).

To this end, Bright will run some workshops (under the auspices of the Advice Provider Forum) to raise awareness of the continuum of collaborative working and the benefits to be gained, and support organisations in taking steps towards joint working.

It is anticipated that engagement in ACFA and the Joint Planning Board will also give rise to new opportunities for collaborative working with a specific aim of joint tendering.

Referrals

Knowledge and understanding by mainstream advice agencies and BME organisations about what each other does in relation to the provision of advice and rights information is patchy, and only a few have formal referral policies and procedures. Bright will work with the mainstream agencies to develop standard referral forms, and will use a range of techniques (including the Advice Provider Forum and newsletters) to share information about what services each of the agencies provides and how they work.

Developing capacity

BME organisations have identified a range of development needs. Bright will develop a training and development programme to respond to needs identified through the audit, with fundraising a priority. The programme will take account of the fact that many workers find it difficult to take a full day out from their work for training, and will provide a range of development options, including coaching, mentoring and distance learning.

Bright will arrange to provide the sector with regular funding updates. Bright may access these updates themselves, make arrangements with other Infrastructure Organisations that currently offer this service, or explore opportunities such as the recently announced NCVO funding portal.

Attracting other sources of income

In the context of limited and reducing funding, organisations will need to explore and develop other means for generating income. Bright will provide information and support to organisations to enable them to generate income through methods such as gift aid, legacies, social enterprise, procurement and selling services (such as translation). While the Advice Provider Forum might provide a means for doing so, it will also be important to use other mechanisms (such as those suggested above under Developing Capacity) to reach organisations who are unable to attend meetings.

Monitoring achievement

On the basis of this strategy Bright will put in place an action plan for October 2009 – March 2011 for delivering the actions outlined above. This will set out the timescale, resources, milestones, and outputs for each element. The action plan will be monitored on a monthly basis.

Appendix: funding sources

Funding sources already accessed by local organisations

Quartet

The survey of organisations revealed the important part played by Quartet in helping local donors support local charities. Many respondents referred to this as a source of small amounts of money.

<http://www.quartetcf.org.uk/>

Potential funding sources

While of course it is not possible to predict funding sources that may emerge in the future, it may be helpful to identify current or recent funding streams that may have been accessed by the sector, and should be watched as possible sources in the future.

Community Development Foundation

Grants of between £50,000 and £250,000 are available to organisations with an annual income of at least £200,000 that are in financial hardship as a result of the recession, which is impacting on their ability to deliver services in the following areas:

- health and social care
- housing support
- education and training
- information, advice and guidance.

The Hardship Fund is currently open for applications. Grants will be paid from October 2009 and need to be spent by September 2010.

Equality and Human Rights Commission

Earlier in the year the EHRC launched a funding programme primarily aimed at projects providing specialist legal advice and representation in equality and human rights. The Commission was particularly keen to fund activity where there was previously no provision or access to advice, as well as to projects which promote awareness and understanding of equality and human rights laws.

The fund covered:

- The provision of legal advice, casework and representation to individuals about matters falling within the Equality and Human Rights enactments.
- Raising awareness and knowledge of equality and human rights.

<http://www.equalityhumanrights.com/>

Capacitybuilders

The Capacitybuilders Modernisation Fund was one of a series of new funding programmes launched by the Office of the Third Sector in February 2009 aimed at managing the impact of the recession on the third sector. Organisations eligible for funding included those providing advice, information and guidance.

For the first stage of the programme, organisations were invited to apply for £1,000 bursaries as part of Phase One of the programme. Further grants of around £10,000 will be available in the autumn for organisations who, having gone through Phase One, want to make further progress towards collaboration and/or merger.

In addition, Capacitybuilders has launched its Volunteering Management programme, providing support to people who manage volunteers, and will help ensure that volunteers themselves get the best possible experience. A bursary fund to help support training for people managing volunteers will be available from April 2010.

<http://www.capacitybuilders.org.uk/>

Futurebuilders

As a separate part of the Modernisation Fund, Futurebuilders will be offering loans of £30k and above to organisations that already have an understanding of the action they wish to enable their business to become more resilient to the downturn.

<http://www.futurebuilders-england.org.uk/>

On-line resources for fundraising

Funding Central

This is a new website, with free information, set up by NCVO and the Office of the Third Sector to provide comprehensive information on national and local government funding, European funding and charitable sources. It also provides other free tools and materials.

<http://www.fundingcentral.org.uk/Default.aspx>

FunderFinder

This is a subscription service or organisations can pay per hour to use it. They have some free materials on the site.

<http://www.funderfinder.org.uk/>

GRANTnet

Presented in the format of an online, step-by-step questionnaire, GRANTnet enables organisations to identify and select funding schemes and awards that are appropriate for their project.

<http://www.grantnet.com/>