



FUNDER PRIORITIES INVOLVING BENEFICIARIES IS INTEGRAL TO SUCCESS

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INTRODUCTION



“We want to see that you developed your idea by involving the people who will benefit. We want to see that you have spoken to people and listened to what they have to say.

When people are in the lead communities thrive.”

- **THE NATIONAL LOTTERY COMMUNITY FUND**

As one of the largest, widely accessible UK grant-makers, distributing over £500 million in 2017/18, it is no surprise that [The National Lottery Community Fund](#) plays a significant role in influencing best practice in the voluntary sector.

Many funders look to The National Lottery’s criteria and funding processes as a benchmark and naturally, as their application process emphasises the need to involve beneficiaries from project design through to evaluation, other funders are taking notice. The implications for all charities are clear, whether you are seeking funding from The National Lottery or from elsewhere, it is vital that you involve your beneficiaries at all project points. Arguably more importantly, you need to be able to articulate how you do this well.

When considering beneficiary participation, we need to look at the wider picture. This should not be a tokenistic exercise to tick the box of funder requirements. The reason that discerning funders are seeking people-led projects is because it demonstrates that the charity is beneficiary-focused, evidences need and ensures inclusivity, adaptability and mutual respect are at the heart of their work.

Don’t just embrace beneficiary participation because The National Lottery or another funder told you to, rather involve beneficiaries because it is better for your project, organisation and fundamentally for the beneficiaries themselves.





THE BENEFITS

There are extensive benefits to beneficiary involvement in project design, delivery and implementation. It can add value to your organisation and help you to secure support from discerning funders. Moreover, the beneficiaries you involve will benefit from the process and your future beneficiaries will access an improved service that fully understands their needs.

Through engaging with your work in a meaningful way, beneficiaries can:

- Increase self-confidence and self-esteem
- Feel valued
- Have more influence and an increased sense of ownership
- Learn new skills
- Meet people with shared experiences and have opportunities for peer support
- Increase feelings of self-worth and reduced helplessness by being able to 'give back'.

The Institute for Voluntary Action Research conducted a study in 2013 to explore the Big Lottery Fund's experiences of involving beneficiaries throughout their funding processes.

The report found that benefits included:

- Improved reputation and legitimacy
- Greater effectiveness and efficiency
- Enhanced decision making
- New perspectives.

The benefits to your organisation and your wider work could include:

- Gaining a broader perspective
- Improved quality of projects and services
- Improved future direction and design of future projects and services
- Being reminded of its purpose and objectives
- Contributing to policies with more authority and understanding
- Becoming more efficient and effective
- Writing stronger, more successful funding applications.



WHERE TO BEGIN

The thought of overhauling your organisation's entire approach to involve beneficiaries at every stage of a project may seem daunting to say the least! This process does not need to be as overwhelming as it may first appear.

The first step to increasing your beneficiary involvement is to begin by auditing your current model and ways of working; how are you currently involving beneficiaries? It is really important that you do not overlook the great ways that you are already successfully shaping and delivering your project/s with beneficiary input. This may include consultations, steering groups, evaluation forms, involvement in recruitment, focus groups or facilitated peer support.

It may just be a case of reframing the way that you talk about the people-led elements of your organisation to emphasise that beneficiaries play an active, regular part in shaping your delivery. The input doesn't always have to be formal; it could involve discussions at coffee mornings, general check-ins or your project may be led by a member of the team who used to be a beneficiary of your service and has unique insights.

From establishing what you are currently doing, you can identify gaps and areas for improvement. Crucially, many funders, including The National Lottery Community Fund, are looking for projects to be people-led at every stage. You need to have a robust plan of how you will involve beneficiaries in the planning, delivery, management and

evaluation of your proposed project. You also need to plan how beneficiary input will be measured, valued and implemented.

For example:

"We noticed that our service-users can struggle to apply for their entitlements and benefits. So, we need an advocacy worker who can support our beneficiaries to complete the forms and ensure that they are not missing out on any income that they should be receiving."

Could be reframed to:

"As a support charity for adults with learning disabilities, we have found that often the best way to consult with our service users is through informal discussions with someone they feel comfortable with in their own environment."

Each key worker begins every session by asking the service user how their week has been. The key worker records any issues or challenges on our database.

Through this method, last year key workers noted that 72% of their service users mentioned that they had concerns or worries about their income around the time of the implementation of Universal Credit.

By identifying this concern, we were able to have targeted conversations with our beneficiaries to assess the need for further support. Common issues included difficulty with online forms and uncertainty on whether their income would be affected. Through further investigation, we found that 42% of beneficiaries were not accessing all of the benefits that they were entitled to, this equated to an average reduction of £64 per month for every individual."



WHAT DOES THIS LOOK LIKE IN PRACTICE?

The nature of your organisation's work, the kind of beneficiaries that you work with and your level of contact with this community are all going to have a significant impact on the way in which your charity engages and involves beneficiaries at each stage.

Firstly, you have to be really clear on who your beneficiaries are. For example, a charity who works with children may need to extend the beneficiary involvement to families and parents who are better able to contribute. However, it is really important that, where possible, you work to involve the children too. This is where creativity really plays a role in involving beneficiaries. Whilst surveys and feedback forms may help to collate that data you need, they won't necessarily engage everyone. A variety of creative techniques will engage a mix of people.

One of the most valuable tools to articulating what your charity does and why you exist is your beneficiaries voice.

Case studies, personal experience videos, artwork, poems, spoken word all help to paint a picture of the problem you are working to address.

Plus, the perspective of your beneficiaries is going to be much more impactful to potential funders and new beneficiaries.

For example:

"Morquio disease is caused by faulty genes. It has lots of different effects on my body and I look different from other 12 year olds. I am short, in fact, I am very short. I am only just over one metre tall and I have lots of joint and bone problems.

The joints in my arms, legs and hands are all too loose which can be very painful. My breast-bone sticks out, which is why the doctors say I have a pigeon chest. I also have lots of serious problems with my spine and I have had some big operations to fuse the bones in my neck.

My disease is caused by a missing enzyme which healthy kids and adults have inside them. In healthy people, this enzyme breaks down waste products in the cells and gets rid of it. As I don't make the enzyme needed, molecules store up all around my body causing all of these different problems and more. My body will never be able to make the enzyme I need, so with each year, my disease will get worse and worse.

My mobility problems mean that I need to have my bedroom on the ground floor so that I can get around in my wheelchair. My Mum and Dad needed some help to arrange this, so they contacted the Advocacy Team at the MPS Society."

- **CHRISTIAN'S STORY, [MPS SOCIETY](#)**



HOW TO INVOLVE BENEFICIARIES IN PROJECT PLANNING

Crucially, funders need to see that your project is a direct solution to a real and demonstrable need. You must be able to articulate how beneficiaries were involved in identifying the need and the consequent project design.

Some of the mechanisms to beneficiary involvement at the planning stage include:

- Stakeholder research to understand the biggest issues/problems facing the beneficiary group
- Surveys to seek feedback on a proposed solution
- Focus groups to generate and test ideas
- Beneficiaries included on interviewing panel
- Beneficiaries involved in writing questions for surveys/interviews
- Creative projects to demonstrate need.

People-led project planning in practice

A great example of an organisation involving their beneficiaries in project design and planning comes from the [Bone Cancer Research Trust](#) (BCRT).

In 2015, the Trust were seeking to launch a new organisational strategy to target their approach to improving lives and outcomes for those affected by primary bone cancer.

As a charity that was founded by families of children with primary bone cancer, beneficiary involvement has always been central to the organisation. For the new strategy, they needed to understand and articulate the unique issues faced by patients of this rare and brutal cancer, which, when compounded, contribute to a very different experience from patients with other forms of cancer.

So, before writing their strategy, the charity undertook their largest stakeholder research and consultation to date, involving 321 people through a national survey, 19 people who completed a daily online diary of their experience and a further five beneficiary volunteers who shared their experiences in more depth. The consultation compiled a diverse range of perspectives and experiences delivered through a variety of platforms including quantifiable statistics, diaries, short videos, quotes and case studies. From this research, BCRT collated findings into a report [‘Living with, and beyond primary bone cancer’](#).

BCRT used the findings of the research to shape the direction of their 2017-2022 strategy ‘The Biggest Ever Commitment to Primary Bone Cancer’, focusing their objectives on the priorities expressed by patients and their families. The in-depth understanding of their beneficiaries and demonstrable need for the strategy strengthened BCRT’s applications, helping them to secure core funding from trusts and foundations to support the strategic delivery. Most importantly, the charity is going from strength to strength and has already made significant progress for those affected by primary bone cancer.



PROJECT DELIVERY AND MANAGEMENT

Once you have involved your beneficiaries in identifying the need and designing the project or service, it doesn't stop there.

The most successful people-led organisations actively involve beneficiaries throughout their work. Not only does this ensure that your progress remains focused and relevant, it can be of great benefit to the beneficiaries as a way to be valued, give back and use their experiences to benefit of others.

People-led delivery and management may involve:

- Beneficiary volunteering and/or working from board and senior management level to operational roles
- Peer support
- Steering groups
- Annual events and/or conferences for your community
- Creative approaches to raising awareness/ advocacy including videos, sharing experiences and arts projects.

A great example of people-led delivery

BlindAid, a London-based charity connecting blind and visually impaired Londoners are a fantastic example of the impact of involving beneficiaries in delivery. What is more, they prove that being a people-led organisation doesn't have to be complicated.

BlindAid alleviate loneliness and social isolation through facilitating opportunities for visually impaired Londoners to get out in their community and socialise with people with shared experiences. They provide a Community Sight Support Service to ensure that blindness isn't a barrier to social connection and work to support people with visual impairment to build both their practical skills and their confidence.

Once a Community Sight Support Worker has spent some time building the confidence of a beneficiary, they have found that many of the people they support wish to give back and volunteer to ensure that other Londoners have access to a community of people who understand the challenges of being blind or partially sighted. This beneficiary support has naturally grown and now, over 50% of the charity's 'Community Project' volunteers are visually impaired beneficiaries working to ensure that new members of the BlindAid community are supported by their peers.

Naturally, peer support can play a much more significant role in supporting your beneficiaries as the emphasis on shared experiences can demonstrate real understanding and resonate most with your target group. BlindAid's commitment to ongoing beneficiary involvement has proven attractive to funders including the National Lottery Community Fund and the dedication of their beneficiary volunteers is testament to the great work that the charity is achieving for the visually impaired London Community.



HAS YOUR PROJECT WORKED – LET THE PEOPLE WHO MATTER MOST DECIDE

Involving beneficiaries in evaluation should go beyond gathering feedback.

Consider how the community you support can take a more active role in evaluating your projects and services.

Could you involve beneficiaries in the design of your evaluation, impact measurement and reporting tools?

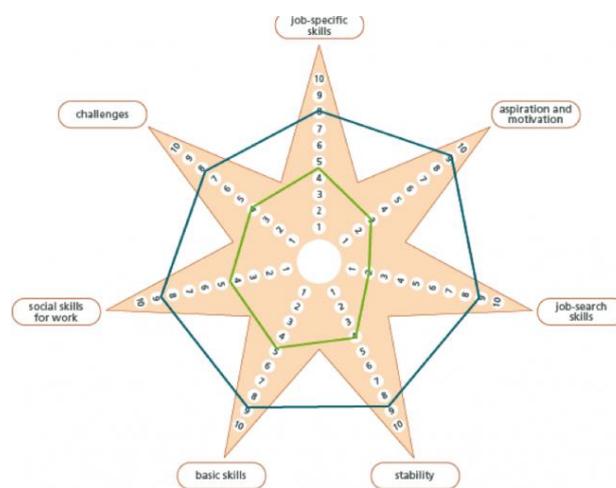
The success of a project or service entirely depends on whether it achieved what it set out to do: improve the lives of your beneficiaries. No one can evaluate this impact better than your beneficiaries themselves. In fact, not involving beneficiaries in the evaluation of your work would be a huge oversight.

Crucially, you need to think about how you are going to regularly evaluate your impact. Don't wait until the end of a project to assess how well you are doing, evaluation is a continuous process.

You may choose to demonstrate impact through asking beneficiaries to complete a survey when they first engage in your service, every six months to a year thereafter and as they leave/complete your service to demonstrate impact.

Involve beneficiaries in shaping what your impact measurement may look like; what is the best way to assess the impact you have had upon your beneficiaries?

For example, many organisations find tools like the Outcome Star are great at measuring a beneficiary's journey whilst you support them and it is particularly visual way to ensure that a beneficiary actively participates in their own evaluation.



People-led evaluation mechanisms can include:

- Outcomes set by beneficiaries from the outset
- Beneficiary-led impact measurement, using tools like the Outcome Star
- Gathering case studies in a beneficiary voice
- Input on evaluation questions
- Beneficiaries delivering presentations, sharing learning/reporting to stakeholder groups and other relevant organisations
- Evaluation/next steps discussion groups.



What great people-led evaluation looks like

[Advocacy Service Aberdeen](#) is a small, local charity that provides a free and confidential independent advocacy service for people with mental health issues, learning disabilities, older people, children with additional support needs and carers.

At the start of receiving Scottish Government funding to employ a Self-Directed Support (SDS) Worker, the charity began the project by asking the question ‘What do the people we work with consider to be the important questions to ask when evaluating the SDS project?’. The organisation engaged a social work student on a placement to minimise the influence of the charity themselves when asking beneficiaries to consider this question.

Historically, the charity set out to evaluate a project solely based on what they had said they would achieve in a funding application. However, through engaging beneficiaries in evaluation, they found that the three questions that service users would prioritise when assessing the success of the project are quite different.

Rather than focusing on outputs and the outcomes set-out in funding applications, the beneficiaries three questions all focused on the relationship between the advocacy worker and service user. Beneficiaries did state that they think outcomes are important and need to be measured, they were more interested in exploring the relationship, trust and empathy.



By considering evaluation at the start of the project, Advocacy Service Aberdeen were able to design a process that painted a better picture of the impact their project has on their beneficiaries. They were able to combine both outcome measurement with the three questions that service-users regarded as most important to evaluating and shaping their project.

“Advocacy only works if you can trust your advocate – you have to know that they’ll always be honest and that they care about you.” – Service User



IN CONCLUSION

If you are an organisation that is benefitting people- you need to involve your beneficiaries in your work at every level.

This process doesn't have to be complicated or involve an entire overhaul of your organisation and ways of working, but "how do we make this people-led?" should always be at the forefront of your mind.

By clearly articulating the mechanisms that you already have in place for beneficiary involvement and through adopting a few more new, effective methods, your organisation could improve your services, add extra value for beneficiaries and ultimately contribute to more informed, effective and successful funding applications.

Do you need some help with:

- An application to a large funder like the National Lottery Community Fund
- Writing a case for support
- Articulating how you involve your beneficiaries?

Make the most of our FREE ADVICE TUESDAYS. [Click here](#) to book your appointment.





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