

## Relationship and reporting guidelines for grantees - Ideas and Pioneers Fund

### 1. Introduction

Our Ideas and Pioneers Fund supports people who have unusual or radical ideas to improve the life chances and opportunities of individuals and communities in the UK. Your idea will still be at an early stage, so the grant is intended to provide funding to help you get started and we will introduce you to a group of peers for mutual support.

As you are developing your idea and testing out new approaches, we understand that not everything will go to plan and things may not work out as you had intended. We hope that you will be able to reflect on the experience of developing your idea, share this learning with us and your peers, and use it to inform your future plans and activities.

For the Foundation, a successful grant could be one where those involved have learnt that the idea has promise and can be taken forward, or, where the idea has been fully explored and found not to be workable. In every successful grant we would expect to see clear progression, reflection and learning.

We ask you to reflect on your experiences and share your learning with us and your peers to help us to:

- understand better what works and what does not, and how doing things differently can work in different contexts;
- maximise the value of the peer support within the Ideas and Pioneers Fund, so others can also benefit from your learning and vice versa;
- understand whether Ideas and Pioneers Fund grants are helping to achieve the aims PHF had for them in developing our funding strategy; and
- identify whether we need to change anything about the Ideas and Pioneers Fund e.g. the length of grants or types of support available.

### 2. Our relationship and approach to reporting and learning

During your grant we want to let you focus on developing your idea, but we recognise that there will be challenges along the way. We hope to facilitate your progress through bringing grantees together for peer support. We will organise periodic meetings where you can share with your peers, reflect on progress, challenges and seek advice from others who are on a similar journey.

We understand that there will be many changes as the work progresses and you act on your learning. You do not need to tell us about most of these changes as long as the work remains in line with your original aim and budget. **If, however, there are any significant changes to the activities of your work, or to the original expenditure budget, these must be agreed with the Foundation before you go ahead.** Examples of significant changes include: a change in your personal circumstances so that you no longer can take the idea forward; a change in what you are aiming to do; changes in the key personnel working on the project; a change in your relationship with the organisation through which the grant is being paid; or, a big rise or fall in a significant cost. If you are not sure, please check with your PHF contact.

Conversations with grantees help us to understand their work and how we can make more effective grants. During the lifetime of your grant, we will arrange a mid-point conversation to catch up.

At the end of your grant, we will ask you to send us a short report reflecting on your experience, learning and achievements. Once we have received your report, your PHF contact will be in touch to talk about what you have learnt and to discuss next steps. Depending on what you hope to do next, we may be able to help you publicise your work or to meet and share your work with others. When we talk to you, we will also ask you for feedback on your experience of having a grant and whether there are any changes or improvements we could make to our approach.

We are also interested in learning about your progress over the longer term. We will contact you 12 to 18 months after the grant is completed to find out about what has happened since. We will analyse information from grantees' reports to help us to assess the overall effectiveness of our funding strategy. We may share the overall learning from some groups of projects with other people. When we produce reports or presentations to be shared beyond the Foundation, we will not identify you without your permission.

Over time, we would like to build a group of alumni who feel able to support new grant recipients through the sharing of what they have learnt. We hope you will support this ambition and be willing to support others who are embarking on their journey.

### **3. Format and content of your report**

At the end of your grant, we will ask you to send us a short report reflecting on your experience, learning and achievements. In your report, please tell us:

- Who was involved in the work;
- What you set out to do and what you did;
- What changed during the course of the grant;
- What were the main challenges and how you addressed them;
- What were the things that were most helpful to you (e.g. time, advice, contacts, money);
- What you've learnt, including anything you would do differently;
- What you've achieved;
- What you plan to do next, if anything; and
- How the grant was spent (a breakdown of income and expenditure for the work funded).

Once we have received this report, we would like to have a conversation with you to discuss and reflect on your experience and achievements. This is likely to be through a phone call. We expect your report to be no longer than 4 sides of A4 with the account of how the grant was spent presented separately in an excel document. Please note that our online submission system cannot accept video or sound files, but if you have some supporting information in this format you are welcome to share it with us.

### **4. How to send your report**

Please send your report through your [online account](#). This is the same system that you used for submitting your grant application. A form will be published to your registered online account under the Requirements section, you may then submit your report online. If the primary contact & email address of the grant changes, you should let us know so we can update who the report form is published too. If you have any difficulties, please contact us via your PHF contact or by emailing [information@phf.org.uk](mailto:information@phf.org.uk)