Advice on setting up and running a grants programme for learned societies

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The following advice has been produced to help learned societies who may be considering setting up a grants programme. The advice is based on the experiences we had as an organisation setting up a grants programme for the first time. Grants programmes are an excellent way to support those in your community that you otherwise might not reach. It takes time (more than you think) to set up and administer, so alongside this advice, please consider that staff in your organisation may benefit from training or other knowledge sharing to help them.

Why have a grants programme?

Before embarking on running a grants programme it is important to be clear on the reasons why a grants programme is needed and what the overall objectives will be. To help with this, consider the following questions:

- What is it you want to achieve?
- Are there other ways to meet these objectives and will the objectives be best achieved by running a grants programme?
- What are the benefits and drawbacks of a grants programme?
- How will a grants programme be funded and is this a responsible use of money?

Furthermore, it is important to consider the different organisations and players involved in running a grants programme. Who from the organisation will be involved in running the grants programme? Will it be run solely by your organisation, or are you working in partnership with another organisation?

Whoever is involved, it is important that everyone is working towards the same objectives and agree on the overall aim.

Creating the application

To avoid reinventing the wheel, before creating the application form it is a good idea to research what other similar organisations that have run a grants programme have done and to ask what you like or dislike about their approach and what you can learn from this. When drafting the application, consider including the following sections:

1. Eligibility criteria
2. Application requirements
3. Selection process
4. Selection criteria
5. Key dates
6. Terms and conditions
7. Reporting requirements for successful bids
8. Transfer of allocated funds
9. Privacy
10. Further details

It is also advisable to allow plenty of time for applicants to apply, giving at least a month (preferably more) between launching the application and the closing date.

We recommend setting a preferred page length for the application, on the understanding that most applicants probably won't keep to this, but it will help to cut down very lengthy applications.

Finally, be clear about any expectation of grant award winners, including if any information may sit on any web pages, what the reporting requirements will be, etc.

Managing the application process

Holding grant information sessions has several benefits for both applicants and the organisation running the bid and is a very effective way of achieving transparency, providing an opportunity for potential applicants to ask specific questions about the overall grants process. As the organisation running the grant process, it will give you a better idea of what applications might be put forward and it can help to gauge the number of bids, while for the applicants it allows them to ask questions on the process to ensure they do not unnecessarily waste their time and it can help them to better formulate their ideas.

Having a date by which organisations can submit their bid for a pre-eligibility administration check is beneficial. Not only can it help to spot those small administrative errors, such as a missed signature, thereby reducing the amount of time spent rectifying such errors on the close of the application, it also gives those running the grant bids an insight into the number of bids that are expected and the theme of these.

The funding panel and feedback

When appointing a funding panel, consider the following:

- Appoint a panel chair who is independent but has a proven track recording of running funding schemes/awarding grant funding and understands your organisation and its goals.
- Appoint a panel with a mix of skills and experience relevant for the funding in question. For example, when appointing the EDI small grants panel, we focused on those with previous experience of grant awarding or those with EDI experience.
- Consider whether you want to have positions on the panel that your community can apply for and what that application process might look like. Avoid overly onerous administrative processes where possible.
- Consider whether you want the panel to be made up of staff or members of your organisation, or whether it would be better to appoint a panel of people who are independent of your organisation. You may also want to invite a representative from your funders to be part of the panel, possibly as a silent observer.
- Where possible, try and appoint as diverse a panel as possible, both in terms of previous experience and protected characteristics. The more diverse the voices and experiences of the panel, the more likely it is that you will avoid having an echo chamber and the greater the diversity in grant awardees.

- Ensure your panel have a full understanding of the purpose of the grant programme. Running induction sessions is a good way to achieve this.
- Make sure to send the panel members the bids with sufficient time to prepare in advance of the grant panel meeting, giving them enough time to look over the bids and analyse them independently – it might be useful to compile the bids together into one document, making it easier for panel members to switch between bids during this process.
- Have a scoring system for the panel to use when deciding which bids to award is beneficial to ensure all elements of bids are weighted and considered appropriately.
- Get quality feedback from the panel, including both the positives of the bid and areas to improve on. This is important for both successful and unsuccessful applicants, as this can help those who apply to improve on any future bids they make. Communicate clear reasons against the eligibility criteria why any applications were unsuccessful and advice on what could be changed.
- Where applicable, if the panel is in overall support of awarding funding but there are outstanding issues or questions surrounding that bid, consider whether it is worth adding a chair's action – meaning the bid will be awarded on the understanding that this action is met.
- Be open and transparent in who the funding panel are and how they were appointed.

Support during grant delivery

Once grants have been awarded, it is important to consider what role your organisation will play during the delivery phase. For example, consider whether it is appropriate to arrange meetings/catch ups among grant awardees. This can be helpful in some situations, as depending on the context of the grants there may be learning and support that awardees can share with each other.

Be available for grant awardees if they have any questions or concerns during the grant delivery programme. Have a core contact that awardees know they can get in touch with and have that contact maintain regular communication with grant awardees throughout the funding period.

Expect some funded projects to change. In many cases, projects won't keep to the proposed timescale put forth in the application. Some might need to change slightly due to factors outside of the grant awardees control, for example staff changes and illness might mean that project leads change. Be prepared to be flexible and to work with grant awardees to address such problems as and when they arise.

Be clear on timescales with those awarded funding, and don't be shy about reminding awardees of these timescales. This means if things do slip, you should have time to address any delays or barriers before they become a problem.

Upon grant completion

Make sure you give grant awardees plenty of time to complete any final reporting requirements (it is useful if you have outlined final reporting expectations in the original

grant application information) and consider whether it would be better to provide a standard feedback form, or to ask each awardee to complete their own report.

As part of the final report, consider asking questions about the following:
- Aim
- Rationale
- Methods
- Key findings
- Outcomes
- Overall evaluation
- Next steps

Likewise, consider what your organisation can do to support grant awardees take the next steps so that any progress does not cease at the end of the grant funding period.

Considerations surrounding communication and publicising a grants programme
- Consider how best to make potential awardees aware of the grants programme. Think about who your target audience is and where they are most likely to see the grant programme advertised. You might wish to use multiple areas to advertise depending on the specific context.
- Have a plan on how to publicly announce who or what projects have been awarded the funding. This is beneficial as it makes the grants process more transparent and provides an opportunity to celebrate the work you are supporting through the grants programme. Where possible, encourage awardees to engage with these communications to support in making these communications authentic and reach wider audiences, for example through providing quotes for an announcement or sharing with their own network.
- Consider if you want those who received funding to take part in any public activities related to their initiatives, such as reporting or knowledge sharing session and have a communications plan around this.
- It is useful to have a section on your website related to the grants, including a short description of what exactly the funding is supporting, a quote from someone close to the funded project and any relevant information and links. An example of how we have approached this can be found on **the EDI Hub**.

About the EDI Project

The EDI Project is a joint programme between The Academy of Social Sciences (AcSS), its member Social Science Societies and the ESRC: Economic and Social Research Council. The project aims to encourage and facilitate greater awareness of, and actions to support, EDI across member social science societies, by working together to share resources, learning and to maximise the potential to effect real and positive change. Find out more about the project **on our website**.

About us

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The social science disciplines include: anthropology, architecture and planning, business and management, criminology, development studies, economics, education, human geography and environmental studies, law, politics and international studies, psychology and behavioural sciences, regional studies, sociology, social work and social policy.

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