

# Future Support and Advice to Rural Communities



PEOPLE, COMMUNITIES AND PLACES

# **FUTURE SUPPORT AND ADVICE TO RURAL COMMUNITIES**

**Rocket Science UK Ltd**

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# 1 EXECUTIVE SUMMARY

- 1.1 Rocket Science was commissioned to review the advice and support on funding that is available to rural communities in Scotland, with a specific focus on the role, performance and future of Rural Direct, a national information service provided by Scottish Council of Voluntary Organisations (SCVO) on behalf of Scottish Government.
- 1.2 We have consulted widely with rural communities and support providers and worked with SCVO staff to analyse the management information related to the Rural Direct service.
- 1.3 Our main **findings** are:
  - Rural community groups' **needs** in terms of advice and information on funding are complex and diverse, with some groups requiring intensive one to one support and others reporting that infrequent support is more suitable. Advice providers also emphasised that community groups often "*don't know what they don't know*", meaning that the required level of support may be higher than community groups have suggested in this research.
  - Across a wide range of areas of advice and support, rural community groups did not feel that their needs are met by currently available support. Areas of support which were less frequently required by community groups were advice and information on non-grant funding options such as crowdfunding/loans etc. and on training. Some community groups valued training and saw this as very important, while others had less interest in this than having others provide them with a service, based on their limited capacity as a volunteer.
  - The **provision** of advice and support around funding for rural communities is complex and diverse, with some identified risks of duplication of efforts amongst different providers, from Third Sector Interfaces (TSI), Local Authorities, LEADER (an EU funded bottom-up approach to rural development), National thematic organisations and other local organisations.
  - Despite there being significant identified capacity for funding advice (which was questioned by advice providers), advice providers reported that the demands on them were high. Community groups' responses identified gaps in the availability of high quality support across *all* of the areas of funding advice and support that were suggested to them in our research.
  - The most significant source of capacity that was not currently being fully used was the experience, expertise and knowledge of those in communities with a history of successful project development and implementation. This related well to the high value placed on this source of support by communities and other providers. It was recognised that for

this to work would require local resources in terms of brokerage and travel and administrative costs.

- In general there was a consensus that the best source of advice and support would be a local one and the TSIs were identified as being the obvious source of this, having been established to ‘provide a single point of access for support and advice for the third sector within the local area<sup>1</sup>’. However, to fulfil this role they would need support from a national service in terms of the quality assurance of advisory staff, the resources for the brokerage of peer to peer support and the expenses associated with this, and a single source of information about funding available for rural community projects. In the medium term at least they would need to work in close partnership with other local providers, notably Local Authorities and LEADER projects.

#### 1.4 The findings from our review of Rural Direct service are:

- Delivery has been “patchy”, with some reports of a high quality service from knowledgeable staff with specific expertise around rural funding routes, and other more critical comments about a service which has not been focused, or not been accessible or of a high quality. The sample size of respondents (either community groups or advice providers) who gave an indication of their views about Rural Direct was small (notably lower than the number of responses to other questions).
- Awareness of Rural Direct was low amongst community groups in the sample, even when taking account the caveat that Rural Direct has been scaled back (so not necessarily at the forefront of respondents’ thoughts). Awareness amongst advice providers was much higher (75% of the sample who responded had heard of it), but the number of advice providers who indicated that they knew even a little about the nature of the service was low.
- A number of community groups and advice providers remarked that the service has not been promoted well enough to help advice providers and community groups really understand what the offer is. According to monitoring data the level of awareness of, and engagement with, Rural Direct saw a step-change in 2011/12 after roadshows were introduced.
- To some extent the reported confusion about Rural Direct’s specific offer is unsurprising, given that the service has changed throughout its delivery period (evidenced by the changes in its required outcomes). These changes have reflected changes in the landscape of rural funding in Scotland.

#### 1.5 Our main **conclusions** are that:

- There is a ***sustained need for advice and information about funding opportunities for rural communities***. It does not make sense to

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<sup>1</sup> <http://www.scotland.gov.uk/Topics/People/15300/Localism>

replicate this in every area as many of the sources of funding are national or regional. There is a general view that the current databases available are very difficult to navigate.

- In particular ***there is a demand for one to one advice*** which can either be provided face to face or at a distance: what is important is that the advice provider is able to relate to the particular circumstances of the community and its needs and opportunities.
  - In general, there is a ***strong preference for a locally based service*** – in terms of both accessibility and a better appreciation of local needs and context.
  - There is ***a wide source of advice available*** in response to these needs, which seems to be facing significant demands. This advice focuses around Local Authorities/LEADER and the TSIs, but it is complemented by a range of specialist national providers of advice on specific topics.
  - The main need seems to be to ***create some clarity about where the first port of call is in any area*** – and to ensure that behind this is a high quality service in terms of information and advisory staff knowledge, expertise and experience.
  - The most commonly expressed view – and one that is consistent with intended purpose – is that ***the TSIs in every Local Authority area should be promoted as the first port of call***. However, it is clear that the TSIs will need to work very closely with their Local Authority and LEADER project to ensure that a locally coherent service is available for groups. Our research also suggests that there are issues about the quality of current TSI support and significant variation both between and within TSIs. This quality issue will need to be addressed. In addition, LAs and LEADER have an established presence in the market and a range of valued relationships which it will be important not to cut across.
  - With many sources of advice and information facing significant demands ***the most underused resource appears to be the expertise and experience of those in community groups who have been through the experience of developing and successfully funding a project***.
- 1.6 It has ***proved hard to separate out support for the funding of projects from support to develop ideas for funding***, and this may in practice be an artificial distinction for communities as the two are so intertwined (e.g. the development of a business plan is also, in many cases, part of the application for funding and needs to respond to funder interest and requirements).
- 1.7 Finally, while we heard some voices challenging the existence of a separate service for rural communities (compared with urban group). Most of those we discussed this issue with felt that there was a need for a dedicated service for rural communities to avoid the risk of a service being dominated by demand from urban groups.

1.8 Our **recommendations** are:

- There are roles that are best carried out at the national scale and others that are best carried out locally. ***We recommend that these national and local components should form an integrated approach which ensures that the information and advice offered is accessible, accurate and of a consistently high quality.***
- At the **national scale**, action should focus on supporting front line staff who are providing advice locally and by ensuring easy local access. There should be a number of aspects to this:
  - In principle, the Third Sector Interfaces are the most obvious ‘first port of call’ for locally accessible funding advice because of their specific role and remit. However, in practice, these are at different stages of development and have varied local profiles. In addition, Local Authorities and LEADER have an established role to play as a ‘way into’ information and advice and many communities have well established and valued working relationships with them. ***We therefore recommend*** that the Scottish Government should encourage and support the development of a strong partnership approach to the promotion of advice and information on funding in each Local Authority area which takes into account local profile and resources.
  - There is an important role to be played at the national level in improving and ensuring the quality of local advice provision through these local partnerships. ***We recommend*** that a national quality standard for advisory staff should be developed and implemented by the Scottish Government.
  - There should be a single, national, high quality source of information on available sources of funding for advisors and rural community groups. ***We therefore recommend*** that steps should be taken to ensure that the SCVO Funding Scotland resource is suitably usable and sufficiently well-maintained for rural community groups. In addition, we recommend that there should be a regular assessment of the provision that other online resources (such as open4community sites) play in particular areas in Scotland and they should be promoted to local advisors where appropriate.
  - A key source of support should involve promoting learning by sharing good practice amongst local advice providers, both in terms of funding advice and in terms of community group success stories – e.g. how and why community groups were able to achieve funding through access to high quality funding advice. ***We recommend*** that this should be spread through existing networks.

- Working with funders (e.g. public funders) to understand the scope that exists for improving the way that their systems of application and claims processes are managed, with a view to better ensuring that the complexity of funding requirements are truly proportionate to the scale of funding requested and are not stifling the entrepreneurship of rural community groups seeking to improve their communities.
- At the local level, **we recommend that:**
  - Third Sector Interfaces should work with Local Authorities and other locally established sources of information and advice to develop locally coherent approaches to the promotion and provision of advice and information on rural funding. This approach should be clearly disseminated, particularly to those communities and groups who may not have been reached by previous efforts, and to groups who face local needs but lack experience in taking forward and funding local projects.
  - The form of provision should involve quick tips and advice / signposting and specialist advice, and also the provision of intensive support for those groups who need it, especially community groups who are at an “early stage” of development. This service could be delivered in person, with telephone support a suitable alternative (as per community groups’ expressed desires).
  - The local partnerships will need to ensure a consistently high quality of adviser support and should work closely with national support to implement, maintain and build on a national standard for staff providing advice. In each Local Authority area this should involve all those staff who provide information and advice to rural groups.
  - The service should develop a strong focus on peer mentoring from other community group members who have “been there and done it”. This will be required to provide the local capacity to provide intensive one to one support for those that need it. Support from such individuals was often cited as being valuable by community groups, and there was support for the idea of peer mentoring at advice provider workshops. For peer mentoring to work, there needs to be a well-designed brokerage and support process to allow this to happen. This will need to include an effective matching process – or needs/situation with experience/expertise, advice on how to provide effective peer support, and an effective system of provision of expenses for mentors.



## 2 INTRODUCTION

### 2.1 Rocket Science was commissioned to:

- Assess and provide evidence on rural communities' level of awareness of the Rural Direct service, including the searchable map-based database
- Assess the quality and added value of the service received by communities who have used the Rural Direct service
- Assess the value to rural communities of the Rural Direct database
- Map out existing funded advice available to rural communities, including through LEADER Local Action Groups (LAGS), Fishery Local Action Groups (FLAGS), Third Sector Interfaces and organisations such as the Development Trusts Association, the new SRDP Advisory Service and Scottish Rural Network
- Assess to what degree these and any additional identified initiatives/organisations/services provide advice that meet communities' needs for accessing funding
- Identify any important gaps in provision
- Identify options with advantages and disadvantages for how advice and help for rural communities looking to access funding can be delivered from 2015 onwards.

### 2.2 In carrying out this brief we have:

- Identified the expressed needs of rural communities around advice and support to access funding
- Explored the current provision of free advice and support available to rural community groups to help them access funding and identified the extent to which these meet the expressed needs of rural communities
- Explored the particular role that "Rural Direct" - a national service locally delivered by SCVO and funded by Scottish Government - has played, and how effective the service has been in helping rural communities gain access to funding
- Identified the options for how advice and help for rural communities looking to access funding can best be delivered and making recommendations about the strongest options.

### 2.3 We **consulted widely with community groups** across Scotland about what they need in terms of funding advice and support. We used an online survey (n = 193) and telephone/in-person consultation with community group representatives (n = 24), participants at a workshop at the Scottish Rural Parliament, and one-to-one interviews, both over the telephone and in person at relevant events. Online surveys were principally disseminated by:

- SCVO to Rural Direct's database of community groups (1621 email addresses)

- Notifications in the National Rural Network newsletter
- Emails from LEADER co-ordinators to community groups.

Awareness of the survey was also raised by publicising the survey at events (for example, distributing business cards at the Scottish Rural Parliament) and by further mail-outs from advice providers that we consulted (e.g. Development Trust Association Scotland and Community Woodlands Association).

- 2.4 We consulted widely with **advice providers** across Scotland (n=120) about what they are able to provide in terms of free funding advice and support, using an online survey and one-to-one interviews (both over the telephone and in person) at relevant events. The results were tested at two final workshops with advice providers (n=22) to sense-check the findings and jointly develop conclusions from the research. These events were extremely useful as a means of reflecting on the results of the research, and throughout this report we present these reflections to help the reader better understand the findings.
- 2.5 As well as questions within this consultation specifically about Rural Direct, we undertook desk research of documentation about **Rural Direct's services** and a discussion with a member of staff at SCVO to gain a better understanding of the services offered, what the strengths have been and any particular challenges faced.
- 2.6 Using this research we have drawn conclusions about the gaps between community needs and available provision, and made specific recommendations for the Scottish Government in terms of improving the support and advice available to help rural community groups access funding for local projects.

### 3 WHAT COMMUNITIES NEED

3.1 In this chapter we explore what rural community groups say that they need in terms of advice and support to access funding. Because different groups responded to different parts of the survey, the relevant sample size is shown in each Figure (i.e. n =).

#### The type of advice and support that community groups say they need

##### Quantitative Overview

3.2 When asked about which areas of funding advice and support were vital, community groups were most likely to respond that they needed advice and information which helped them identify the funders with funding relevant to their needs (89% of 193 respondents), as well as support for developing proposal ideas (65%). Advice and guidance on non-grant funding options (e.g. trading, crowd funding) was the least sought after type of advice or support, with 39% saying that this is vital.

**Figure 1: What sort of support is vital to groups like yours? (n = 193 who provided one or more response, 23 did not respond) [Source: Rocket Science survey]**



### ***In–depth Qualitative Analysis***

3.3 To capture the full range of community groups' needs, respondents were asked to comment on any other needs they had (that is, outwith the areas listed above). These qualitative responses were analysed to add insights to the quantitative overview and are presented below.

3.4 A number of groups expressed a **need for support and encouragement in getting members of the community involved**, and the difficulty of working in a volunteering capacity.

*“When I try to encourage people to help me help people - it's not there.”*

*“There are probably only three people in the village who can fill in the application forms. If you're doing things in your community, you have to divert time for these. On average it takes us 3-4 days to fill in the form. If you're doing that, you're not doing something else.”*

3.5 Others expressed a need for awareness of **the distinction between well-established and/or well-informed community groups and groups who are just starting out in community work** and who have no idea where to start:

*“We're well established. What would be great would be a 20 page idiot's guide to community groups accessing funding.”*

*“I think we are very fortunate due to the experience and knowledge of staff and Board teams. However I do think that support to identify funders beyond the usual: how to assess their relevance, and how to have an initial conversation can be very difficult for organisations.”*

*“We were very much beginners on the whole thing. When you're a complete beginner on this sort of thing it's very hard.”*

3.6 Others highlighted the **complexity of the funding advice landscape** itself, and saw there being a potential role for someone to help navigate this support, for example:

*“Perhaps road shows and more promotion of what support is out there would be good. On line support is useful, but also people running workshops for a group is essential so that groups with varied membership can develop knowledge and ownership together. As I said earlier, I see no harm in commissioning some of this work to be done by other professionals as long as the community retained control.”*

This notion of the need for professional advice was also voiced by others, for example:

*“If you want to offer this [advice and support] free, you need lots of money and great care in the quality of the advice – [we have] lots of experience of this advice being provided free but VERY BADLY.”*

*“Skilled support (not all free advice is good quality especially from TSI); peer support from people who have actually been successful rather than just advisors who don't actually do it.”*

- 3.7 Importantly, there was **a significant number of respondents who were clearly unaware of there being any support available**, for example:

*“Some information and support of any sort would help!”*

*“If any of the above [types of funding advice] were available that would help us to make more successful applications.”*

*“Would like to know what support is available.”*

*“More information on services providers could deliver.”*

- 3.8 Other responses by small minorities of respondents included the need for intensive support, the need for a directory of funders and assistance with the challenging language requirements of applications, for example:

Directory of funders:

*“A directory - an easy and accessible list of fund granters together with information on how to target them.”*

Need for intensive support:

*“Accessible one to one support from truly informed, experienced, knowledgeable people.”*

*“It needs to focus on early intensive support - too often it is information provision rather than hand holding.”*

Assistance for the challenging content requirements of applications:

*“In the case of LEADER, help in the form of translation services so that we can present applications in the arcane language required by the EC.”*

- 3.9 Alongside these specific needs, a number of respondents wanted to highlight the need not so much for better advice to navigate the complex and varying requirements of funders, but for **a complete re-think in funders' requirements**, for example:

*"The entire funding process should be redesigned to make it, as far as possible, user friendly without the necessity for external support."*

*"Simplified and more transparent application procedures."*

*"Most funding is project orientated, but organisations have ongoing operational cost - getting general funding is the challenge!"*

### **Particular needs around the format of advice provision**

- 3.10 As well as understanding the *types* of needs that community groups say they have, we also explored needs across a range of different *formats* of provision (within categories of networking, training, provision of good practice resources and light touch / intensive one to one support). The responses were analysed and describe a situation of significant unmet needs across all of these formats, as set out below.

#### ***Networking / Events***

- 3.11 In terms of networking and events, many respondents highlighted the need for events to be **locally accessible**, for example:

*"Locally-based events at local venues. Drop-ins are good where experts are on hand to ask questions. Having funders there is the best."*

*"Locally accessible....Community Land Scotland was great."*

*"Worth their weight in gold but we're in the back of beyond. Need to be accessible."*

Two respondents suggested **travel expenses** for volunteers to attend events and a further two respondents suggested **video conferencing** as an alternative for distant events:

*"...this can be time consuming and sometimes video conferencing or webinars can help."*

Another respondent voiced an interesting opinion that there is a degree of preparation required to get the most out of attending events:

*"You need a certain amount of know-how in order to actually gain something from an event."*

Another respondent suggested that events need to be effective, and not just numerous:

*“More effective ones - there needs to be a learning element to it.”*

### **Good Practice Resources**

3.12 Respondents described a wide range of good practice resources that would be helpful. Some respondents focused on **general resources about business planning and accessing funding**, for example:

- *“Business Plan templates, writing briefs, tender process templates.”*
- *“Clearer advice on bigger funding streams (e.g. EU) and associated bureaucracy.”*
- *“Financial.”*
- *“Guides on how to understand and successfully answer funders’ requirements.”*
- *“Clearer explanation of language used in applications.”*
- *“Advice on sources of funding for ongoing maintenance.”*
- *“Enterprise support.”*
- *“... case studies sharing successful and unsuccessful projects.”*

Other respondents identified more **specialised support needs in terms of good practice resources**:

- *“Legal advice”*
- *“Resources for natural environment rather than built environment”*
- *“Commons in Highland”*
- *“Ideas and mechanics of non-grant fundraising”*
- *“Employment”*
- *“Marketing”*
- *“Policies and procedures templates. Contracts of Employment, etc.”*
- *“HR, risk assessments.”*

3.13 Regarding the format of these good practice resources, this ranged from general sharing from experienced peers to paper based (one respondent) and, much more commonly, **online resources**, for example:

- *“Online and paper based”*
- *“Easy access web based resource”*
- *“... this is about sharing from people that have been there and done it.”*
- *“More online resources and step by step guides that are easy to understand”*
- *“Website.”*

## **Training**

- 3.14 A small minority of respondents chose to emphasise the importance of training to them, for example:

*"[The] main area where help would be appreciated."*

*"That is essential."*

*"When you set up a project it's often easy not to build in training, then you kick yourself because you should have thought to do this."*

- 3.15 This was offset by a different small minority who expressed doubts over the usefulness of training, or the ability of community groups to spend time on training, for example:

*"Training is available, local people having time or inclination to take part in such training can prove difficult."*

*"One to one guidance online and over the phone. Don't need training sessions for individuals or groups - funding requirements are specific to each case, and cannot be discussed in group environments."*

*"Short courses, as time is an issue for stretched group activists."*

- 3.16 As with the responses on the provision of good practice resources, the focus and content of desired training was highly variable among respondents. However, the most common response was around **the need for training on form filling and completing applications**, for example:

*"How to prepare for and fill in applications."*

*"Training in...how to go about compiling an application with a realistic chance of funding."*

- 3.17 The next most common training requirement expressed was **training on how to understand and respond to funders' requirements**, for example:

*"Training in how to interpret what funders are looking for."*

*"Deciphering the requirements to meet the differing funders' key requirements."*

*"Submitting applications to meet changing requirements with grant funders."*



- 3.18 Another common response related to the need for **training to be relevant, specific and/or detailed**, for example:

*“...training is available, but not relevant or accessible.”*

*“Lots going on, I see it in my inbox. It's a question of knowing what you need.”*

*“[It's possible to] end up on a course that won't serve you very well.”*

*“Detailed training not top-line information.”*

- 3.19 However, others suggested that training needs were **broader and more general** than this, for example:

*“A day session giving an overview of funding opportunities for the voluntary sector and how to look for funds would be very useful for those new to the voluntary sector landscape.”*

*“Easy access to funding information.”*

*“Basic funding advice for Board members and what to do to become more enterprising.”*

- 3.20 Other recommendations listed by only one or two respondents included:

- The need for training to be locally accessible and at a convenient time (e.g. evening and weekend provision)
- Training on project management training on compliance with health and safety rules
- Essential training for staff on first aid and food hygiene; and training on marketing, for example:

*“Groups like us haven't a clue about marketing or where we'd go for it.”*

### **One to One Advice**

- 3.21 A small minority of respondents chose to emphasise the importance of one to one advice to them, for example:

*“Need a LOT more of this.”*

*“This is the most important thing.”*

*“This is important to address issues pertinent to individuals and individual communities that may be lost in larger events.”*

- 3.22 Some respondents focused on the need for one to one advice for **early-stage support and/or needs diagnosis**, for example:

*“Someone to come to us and understand our particular needs and priorities - and not fit us into some generic national scheme.”*

*“Early support to refine initial plans.”*

*“Someone who can think through with us what we are trying to achieve, and the sources of funding that might be available for the various elements and timescales for the next funding round.”*

- 3.23 A small minority of respondents highlighted existing high quality sources of provision of one to one advice:

*“The Council. If he can help me he will, but we have to book in advance, they're really stretched. He's really good.”*

*“This is what Rural Direct do very well.”*

- 3.24 Another small minority highlighted the importance of **peer to peer support or mentoring**:

*“Peer support very important.”*

*“Perhaps a funding 'mentor' who can offer specific advice when we are stuck.”*

- 3.25 Other pertinent responses included the need for one to one advice services to be **relevant to groups' needs**, to be provided by **informed people**, to help with prioritising funders and critiquing draft applications, and help with “jargon” on forms.

### ***Intensive One to One Advice***

- 3.26 As well as enquiring about general one to one advice services (which could include light-touch advice and signposting), community groups responded about their specific needs for intensive one to one advice (e.g. five or more days for a specific project and including mentoring). Some respondents were emphatic in their need for this type of support, with a number focusing on **the need for mentoring and/or peer support**, for example:

*“[I/we] have found no provision for this at all. When organisations first start out this is what they need. I know innumerable people that I meet every single week that have great ideas, great enthusiasm and say, 'How the heck do I get this started?'. No help - in fact quite often the opposite.”*

*“It is mentoring that is missing.”*

*“Mentoring and support are key. Uncertainty of individuals within groups of their ability to manage a project can lead to an overall negative outlook that prevents progress.”*

*“This is where I feel rural organisations could benefit and maybe it could be a cascade system so that those receiving this and being successful in bids can contribute to supporting other local peers.”*

*“Practical advice and support from people who have done it before, not from a text book.”*

3.27 Responses around intensive support tended to focus on **early stage help**, for example:

*“Our club is very inexperienced in seeking funding and just don't know 'how to play the game'.”*

However, other respondents indicated that intensive support **could be useful for more experienced groups at specific stages**, for example for funding a big and/or complex project:

*“When looking at big projects with funding likely to come from multiple sources then intensive support and mentoring would be most welcome.”*

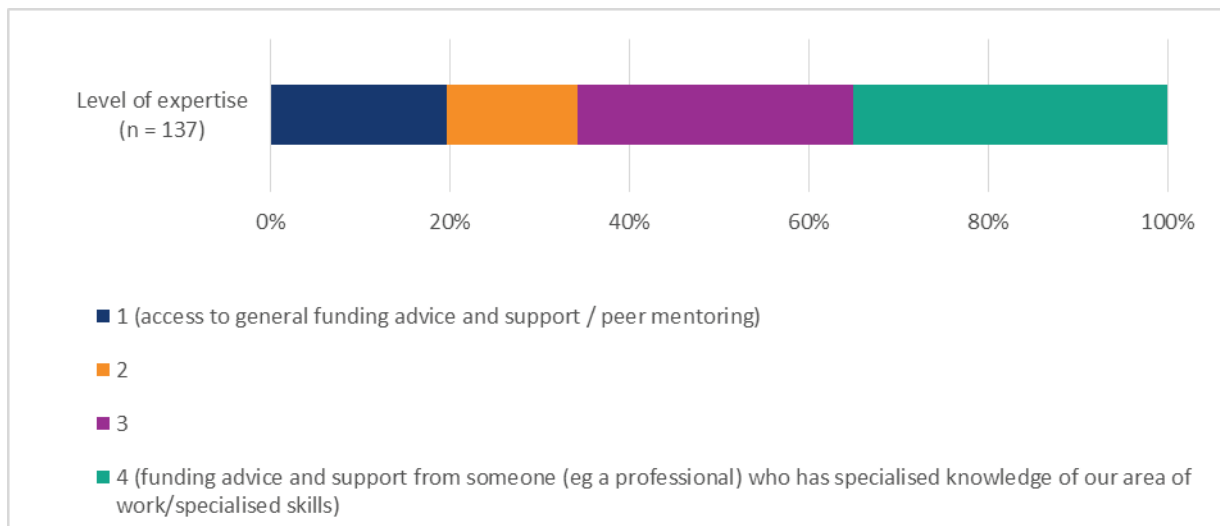
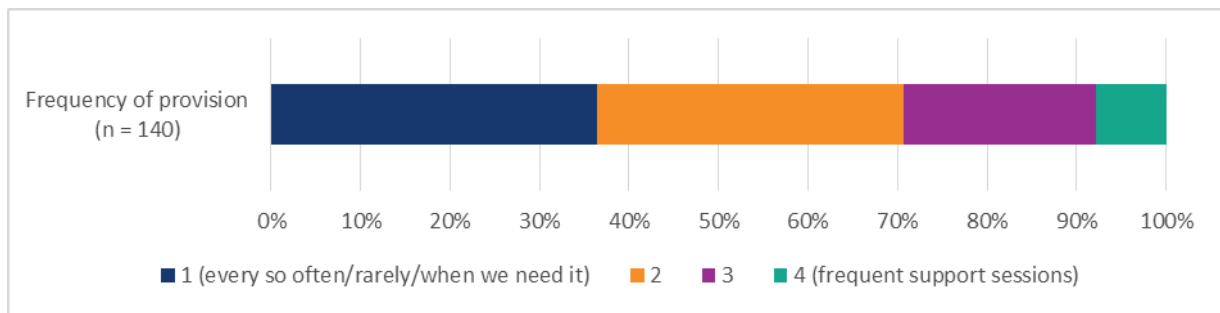
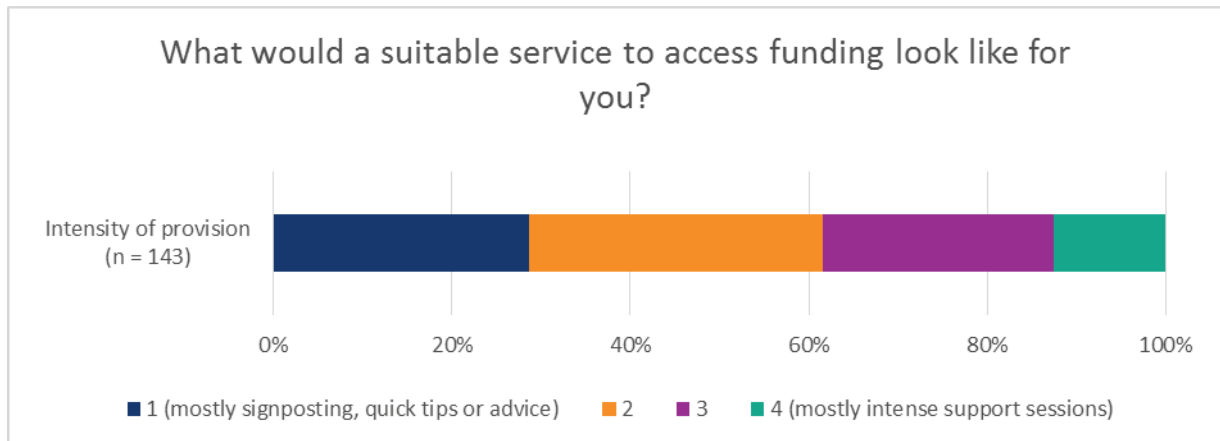
*“On occasion I think we do need this. [We] need better approved accounting systems - we've really grown so need this. [We] need access to intensive support for this - addressing a problem in a way that takes more than a couple of hours.”*

## **What community groups think a suitable service would look like**

### ***Frequency, intensity and level of expertise of provision***

3.28 Our consultation included specific questions about the format of a suitable funding service. Community groups expressed a range of opinions about how support should be delivered, in terms of intensity of provision, frequency of provision and level of expertise. These are presented in Figure 2 overleaf.

**Figure 2: Community groups' views on the type of suitable service for accessing funding: intensity, frequency and level of expertise needed**



3.29 These results were further analysed, specifically to compare the results for desired *intensity* and *frequency* of provision. The 18 people who expressed a preference for mainly intense support sessions described a spread across infrequent and frequent needs. Although the majority of respondents (n = 139) were focused on more infrequent and light touch support (top left quadrant of Figure 3), there is a significant minority (19%) who would like mostly intense and mostly frequent support sessions (bottom right quadrant of Figure 3).

**Figure 3: Community groups' preferences around frequency and intensity of provision**

	1 (every so often/rarely/when we need it)	2	3	4 (frequent support sessions)
1 (mostly signposting, quick tips or advice)	19%	5%	2%	1%
2	9%	18%	6%	0%
3	5%	8%	10%	3%
4 (mostly intensive support sessions)	4%	4%	3%	3%

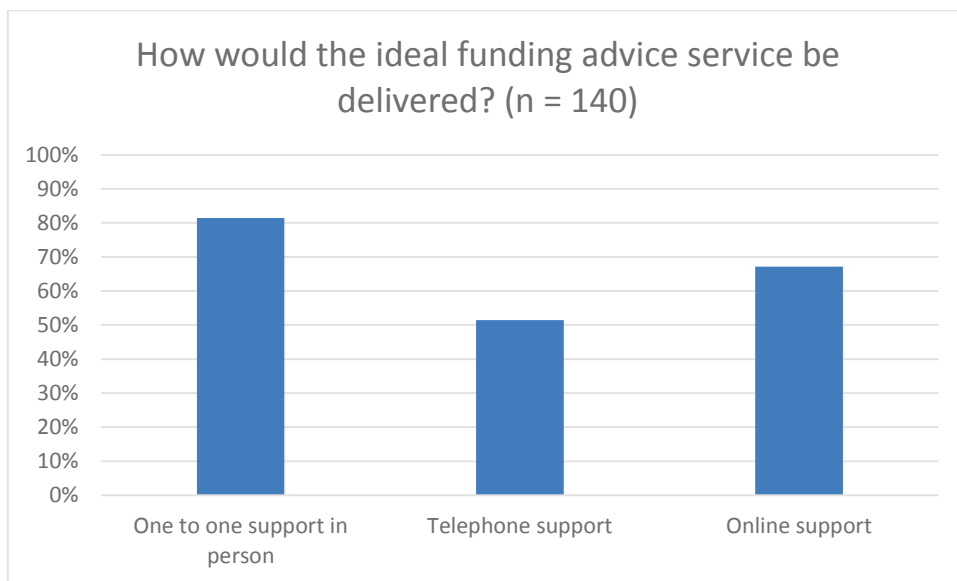
3.30 Some respondents highlighted that needs of a community group vary between different project and at different times. For example, some highlighted that start-up groups require intensive support at first:

*“Small voluntary/community groups need someone to point them in the correct direction for funding opportunities. At the start of this process this could be quite intensive, both in identifying potential founders and writing applications. Once the process is begun, support is needed for financial issues, for example, paying large bills before grant aid is processed.”*

### **The ideal method of delivery**

3.31 When we asked about how the ‘ideal’ funding advice and support service would be provided, respondents expressed a preference for one to one support in person, but online support was also rated highly (more than two thirds rating this as a part of the “ideal” funding service, Figure 4). Telephone support, while slightly less popular, was still seen as being a relevant part of the “ideal” funding advice service by about half of respondents.

**Figure 4: Preferred methods of delivering funding advice for community groups**



### **Reflections with funding advice providers on the research around community groups’ needs**

- 3.32 Community groups cited a wide range of needs, from light touch advice and signposting to intensive, frequent, one to one support. Community groups were less likely to express a need for alternative (non-grant) sources of funding, and there were mixed responses around the need for training.
- 3.33 We reflected on the reported needs of community groups with advice providers at two workshops in Stirling and Inverness (hereafter, the two advice provider workshops). Delegates were surprised at the reported level of demand for light touch advice, with some reporting that a lot of community groups they work with require intensive support. Delegates said that many community groups are not really aware of the full extent of help that they need until they begin their “*funding journey*”, i.e., community groups “*don’t know what they don’t know*”. Delegates also reported that the scale and nature of the project community groups are involved in will condition the responses that they provide around their needs.

## Conclusions

3.34 The main points to emerge from our analysis of need are:

- The significance of being able easily to track down relevant sources of funding – and the need for information sources to be obvious (i.e. well promoted)
- Associated with this, the need for support to develop applications and associated business plans – in other words access to someone with expertise and experience who can act as an adviser or mentor. For many this was seen as a face to face role, but many were happy with a telephone or online service
- Specifically, the need for support early in the process of project development and sourcing funding
- A plea for simpler and clearer application processes and eligibility criteria.

3.35 Respondents emphasised the wide variation in the capacity of communities – varying from those who had experience of applying for funds to those who were “starting from scratch”. This was a key determinant of the type of information needs and the scale and intensity (and perhaps the format) of support needed.

3.36 Another determinant was the scale and complexity of the project and so of the funding package.

3.37 In the next chapter we explore the perceived nature and range of support available before drawing out conclusions about current gaps and issues in the provision of relevant information and support on access to funding.

## 4 WHAT SUPPORT IS AVAILABLE?

### Mapping available support for rural community groups

- 4.1 We have identified a list of over 270 support organisations – these are presented in Appendix 2. These are organisations supporting rural community groups nationally or locally that we identified through our mapping exercise. With such a broad range of support providers at local and national level, it could be argued that there is a “cluttered landscape” of provision for rural community groups. This is in spite of the recent rationalisation in Scottish Government funding, ensuring consistent coverage by LEADER, and directing infrastructure funds to local Third Sector Interfaces with national support through Voluntary Action Scotland.
- 4.2 All Scottish rural community groups can contact their local LEADER group, their local Third Sector Interface (see Appendix 1), or their Local Authority. In addition there are national support services, which are normally thematic (e.g. focusing on energy or woodlands). Depending on where the community is they may also have additional local support services available.
- 4.3 We have surveyed over 100 organisations which provide at least some support to community groups in rural areas around funding advice and support. From this we have mapped out the typical provision in any one area based on responses from local authorities, Third Sector Interface partners, national organisations and local authorities. We have found that on average there are:
- 6 FTE staff in the local authority delivering funding advice and support to communities
  - 5 FTE staff in the local Third Sector Interface partner delivering funding advice and support to communities
  - 2 FTE staff in the local LEADER/LAG body delivering funding advice and support to communities
  - Other local organisations supporting rural communities with funding advice have an average 1.5FTE staff delivering this funding advice and support. As we will see, the distribution of these groups is patchy and some are limited in who they can support
  - National organisations supporting rural communities with funding advice have an average 5FTE staff delivering this funding advice and support. As we will see, national infrastructure organisations tend to be thematically specialist meaning they are limited in what they can provide support about.

Almost all the respondents to the survey stated that the work of this type that they deliver is free of charge for any group or organisation.



If we conservatively assume that only half of these FTE workers are supporting rural communities (even though we have only included rural focused organisations in our sample<sup>2</sup>) and that there are 19 LEADER groups and 28 local authorities in these rural areas each with a Third Sector Interface then **we estimate that there are 100-200 FTE workers delivering free funding advice and support to rural community groups**, though some of the national organisations delivering a small proportion of this support are only for groups with certain thematic specialisms. This number does not take into account the fact that other local support groups will be active in some areas, and additional paid-for provision from consultants, professionals and specialists may be available for some groups.

4.4 We have mapped out the type of support these different local and national support organisations offer around funding advice and support for rural community groups. We asked specifically about seven types of support:

1. Advice and information on which funders may have funding relevant to community group needs (i.e. understanding different funds by type, scale, eligibility criteria etc.)
2. Helping community groups to get in front of relevant funders
3. Support for developing proposal ideas to make them more achievable and/or funder friendly
4. Advice and guidance on non-grant funding options such as trading, crowd funding, loans etc
5. Support to undertake feasibility studies and/or write business plans
6. Writing applications or providing advice about writing funding applications for grants/loans
7. Training to increase community groups' capacity in terms of bid writing, project development, governance/leadership or specialist skills.

4.5 We present our findings in Figure 5 (overleaf) which sets out an overview before showing (Figure 5a – 5e) the profile of support offered by each type of organisation. We found that:

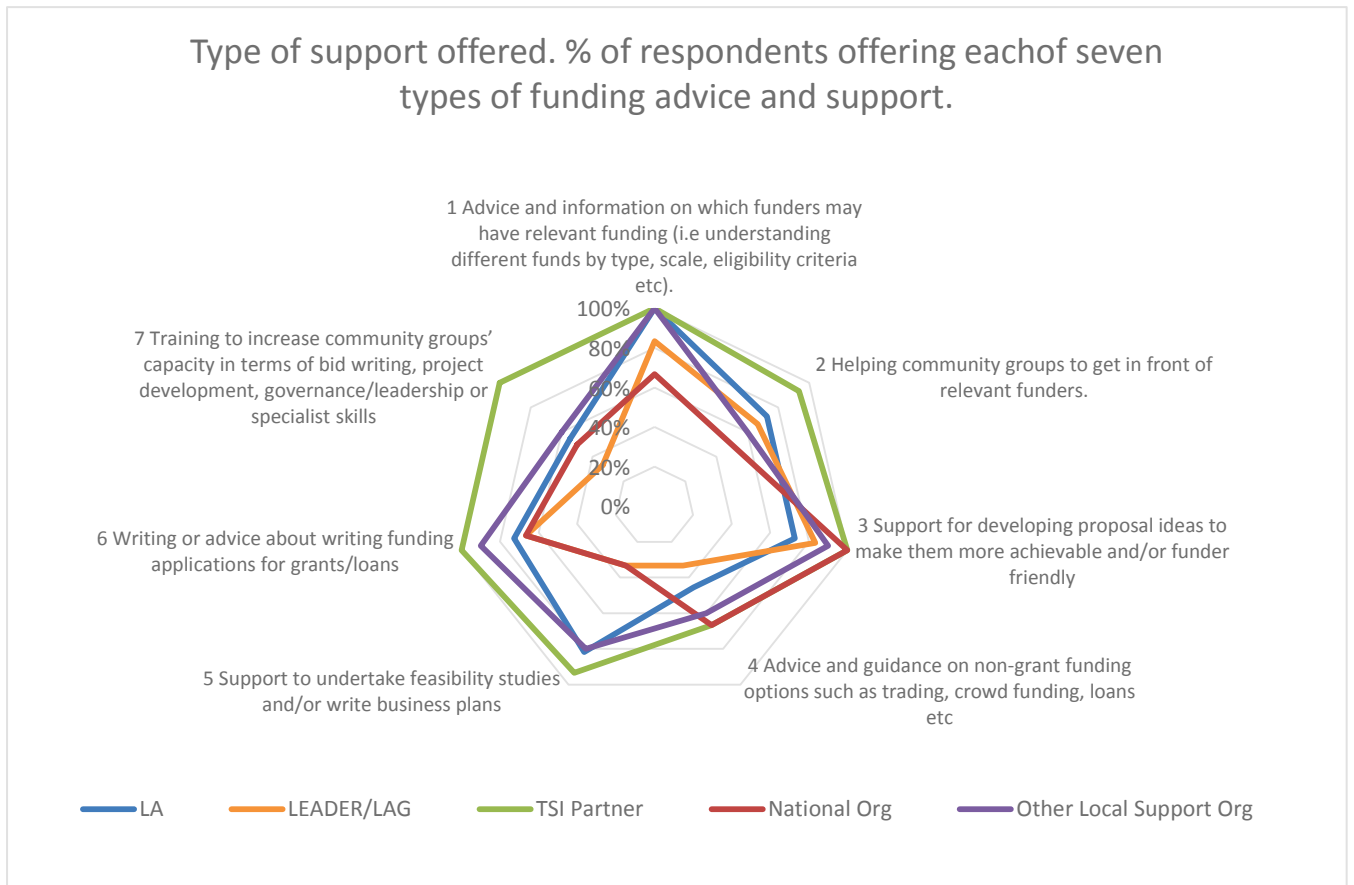
- All Third Sector Interface partners feel that their organisation delivers all or almost all of these seven types of funding advice and support
- Most local authorities also deliver all of these support types
- Of the seven types, the lowest number of organisations offer advice around “non-grant funding options”, but still around half of the support organisations offer this

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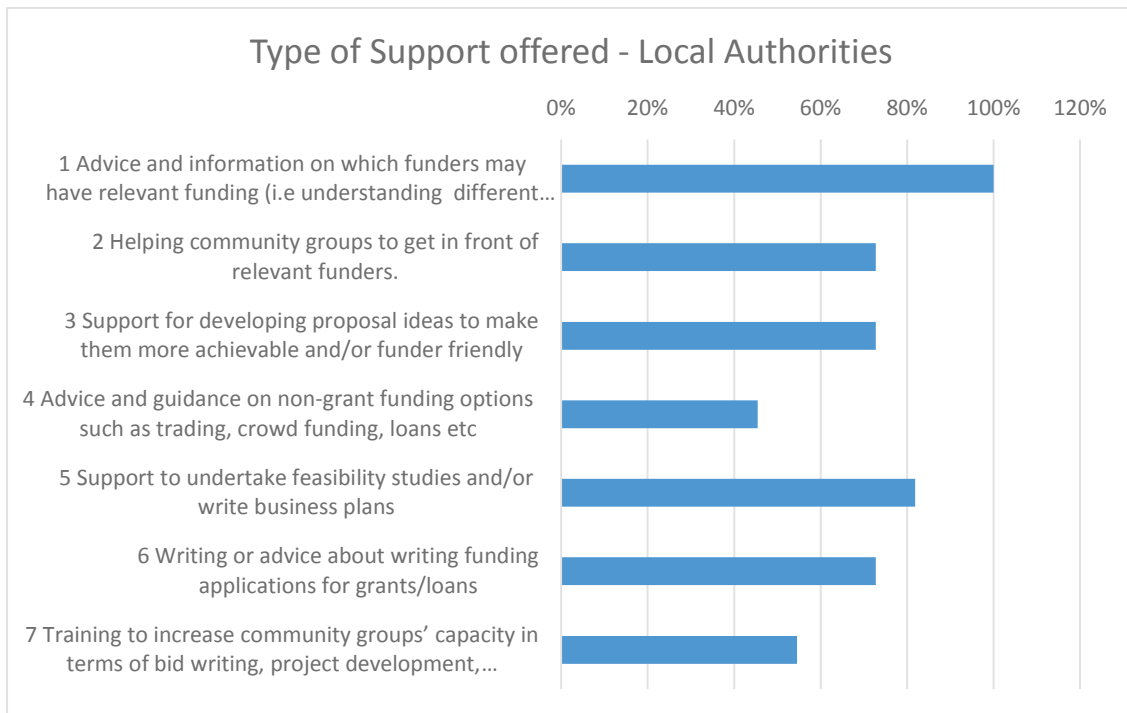
<sup>2</sup> National and local providers (except LEADER, LAs and TSI partners) were only included where they said 3, 4, or 5 out of 5 to both questions: “are the groups you support in rural areas (1= none, 5 = all)” and “does your organisation have a focus on providing funding advice (1 = none, 5 = all)”.

- National organisations offer a broad range of types of funding advice but seem to be a little more specific in which combinations of support they offer (and to whom)
- Not all LEADER organisations projects claim to deliver all of these seven areas of funding advice and support; on average they offer around half of these seven types of advice and support.

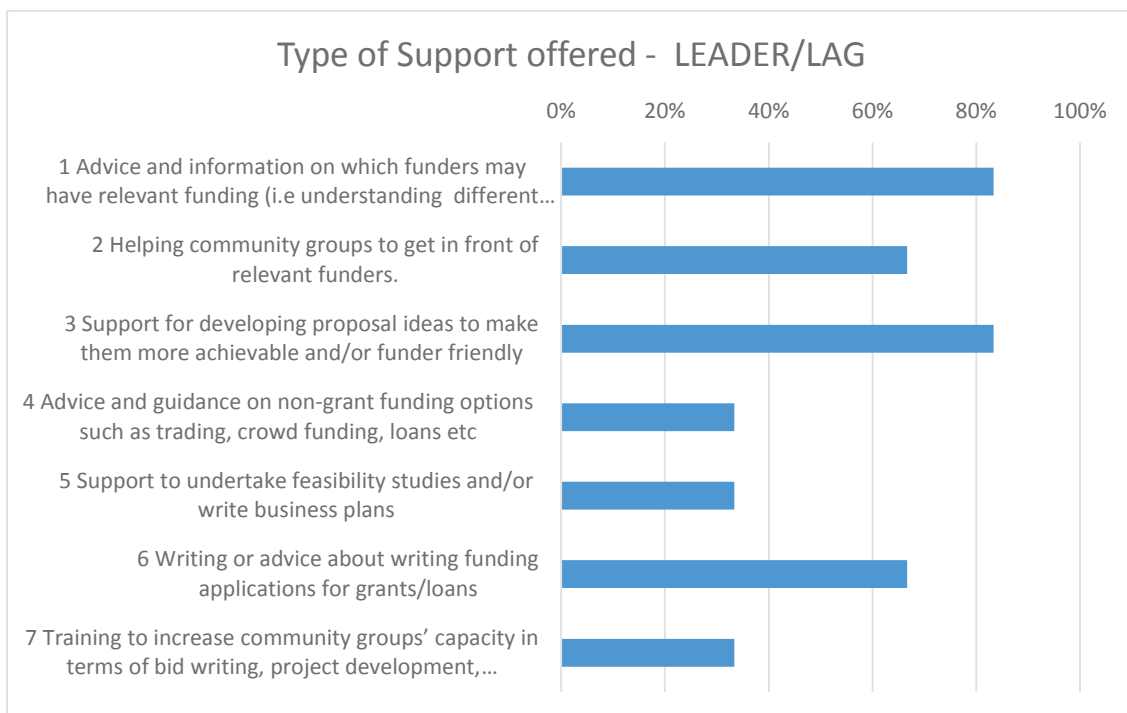
**Figure 5: The type of support offered by funding advisors**



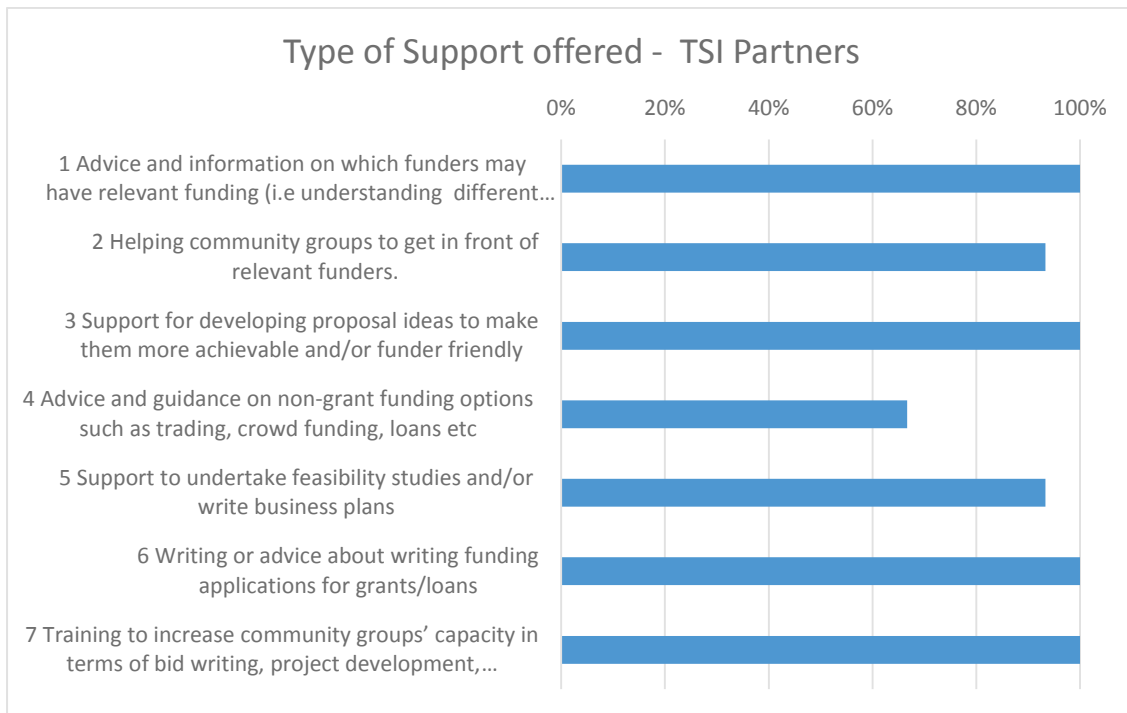
**Figure 5a: The type of support offered by funding advisors (Local Authorities)**



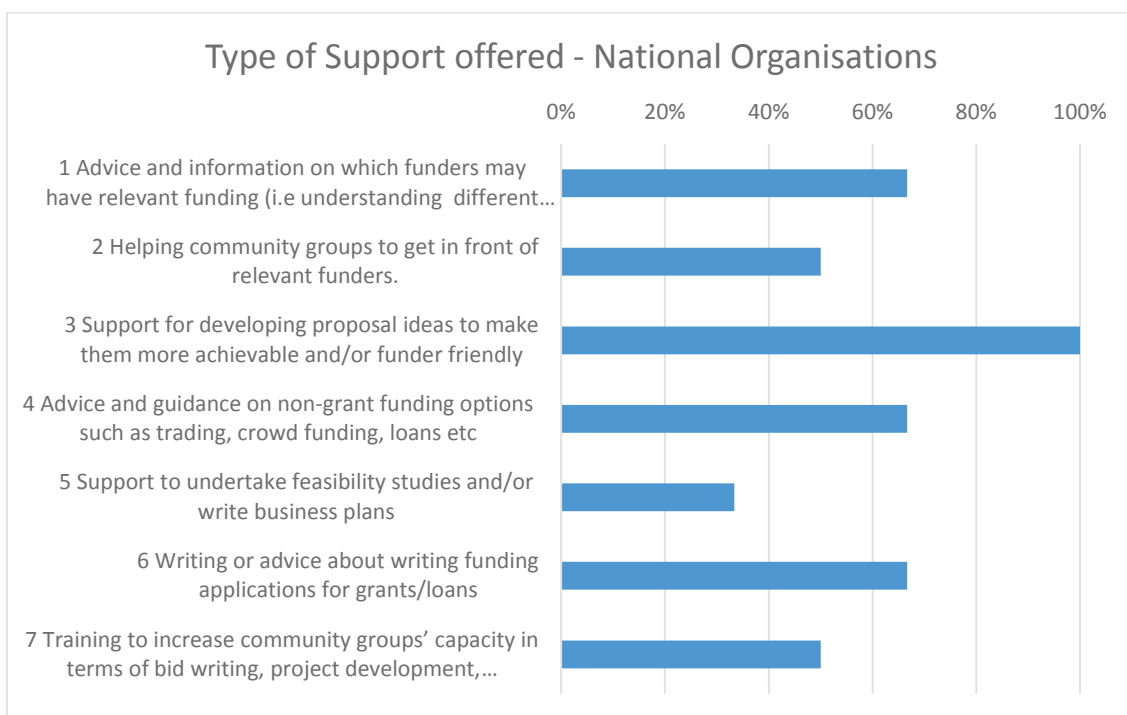
**Figure 5b: The type of support offered by funding advisors (LEADER)**



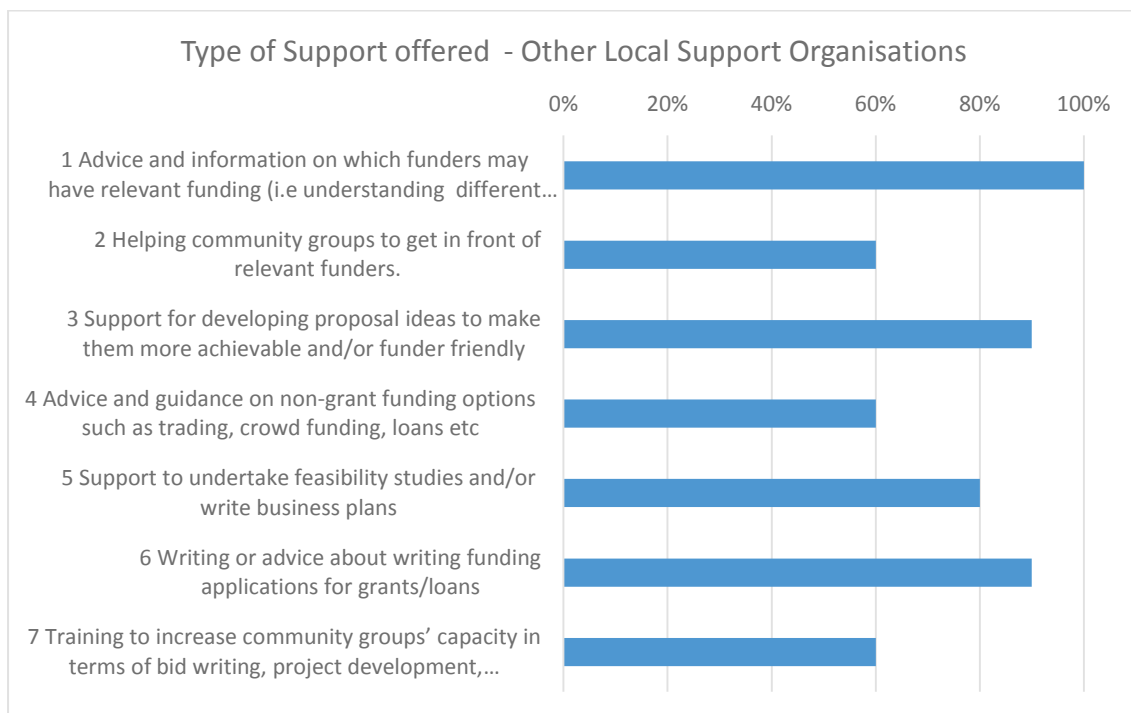
**Figure 5c: The type of support offered by funding advisors (TSI Partners)**



**Figure 5d: The type of support offered by funding advisors (National Organisations)**



**Figure 5e: The type of support offered by funding advisors (other local support organisations)**



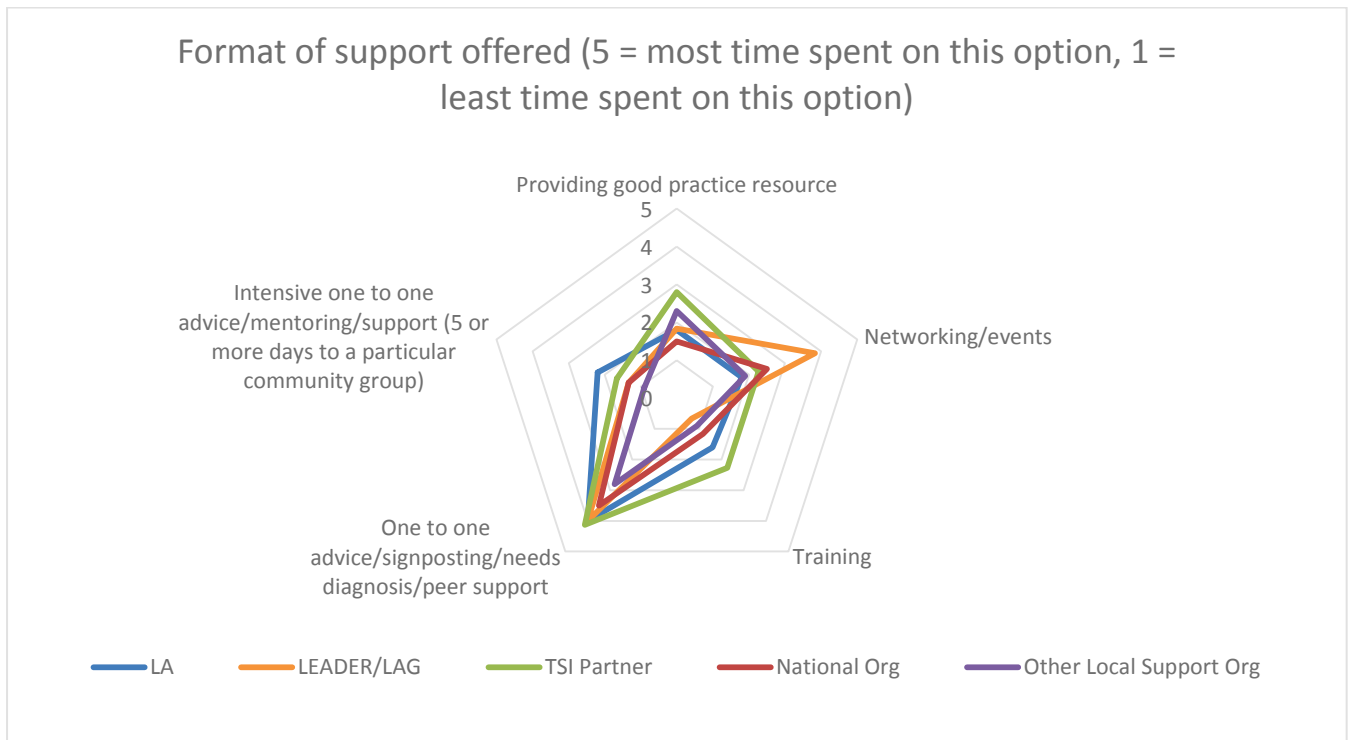
4.6 We also asked how funding advice and support providers for rural community groups distribute their time between 5 different types of support:

- Providing good practice resource
- Networking/events
- Training
- One to one advice/signposting/needs diagnosis/peer support
- Intensive one to one advice/mentoring/support (5 or more days to a particular community group).

4.7 Figure 6 overleaf shows that:

- All types of funding advice and support organisations spend more time on one to one support than any other type of support
- Few spend a large portion of their time on *intensive* one to one support (over 5 days)
- Third Sector Interface partners tend to offer all these types of support whereas others focus on a smaller selection of these ways of working.

**Figure 6: Time spent on different kinds of support [Source: Rocket Science survey]**



4.8 Finally, we looked at the different types of groups that the funding advice and support providers work with in terms of:

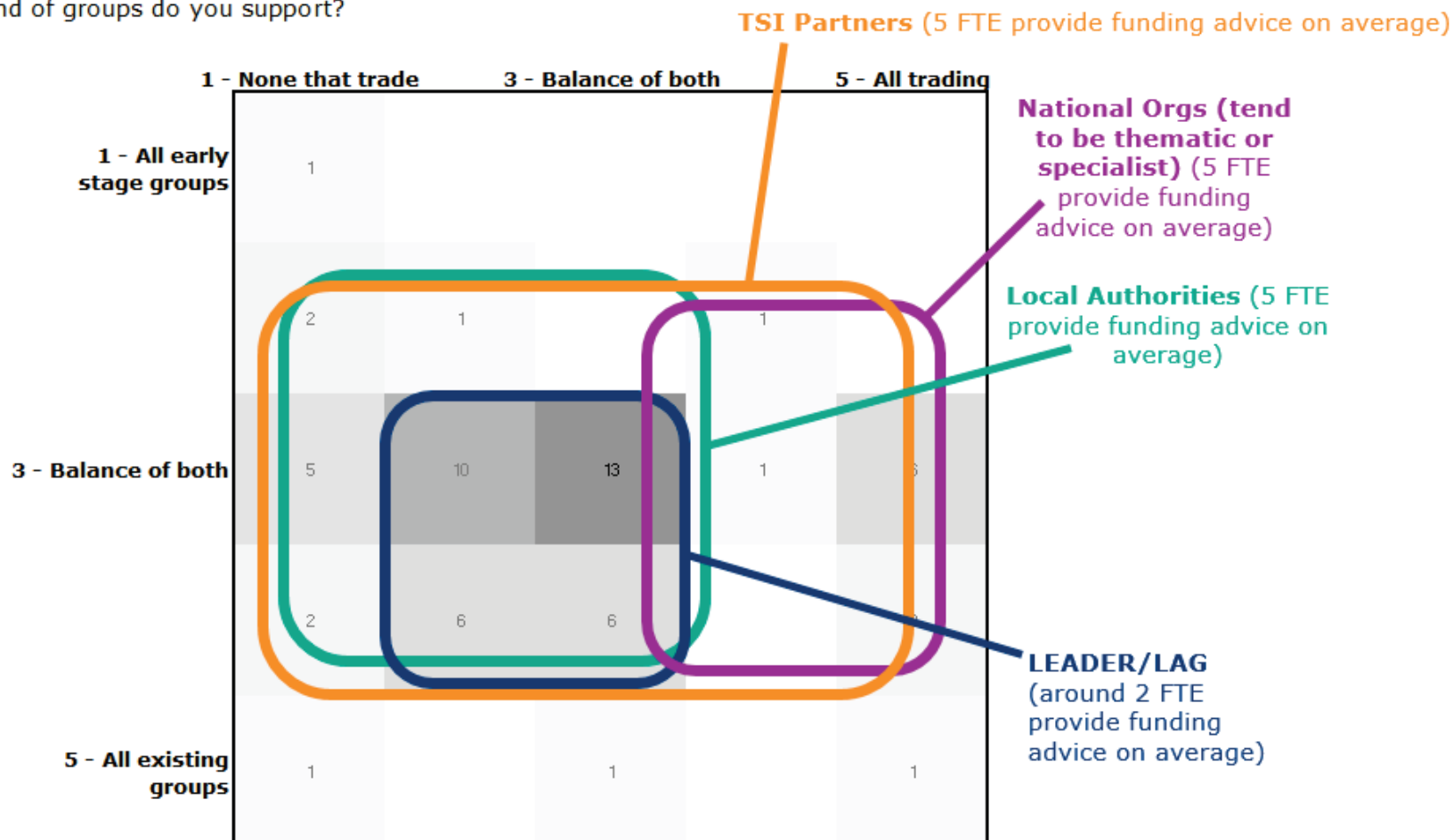
- Whether the beneficiaries are early stage or existing groups/organisations
- Whether the beneficiaries have a focus on trading/enterprise/community energy or not.

Figure 7 (overleaf) shows that, while the majority of support providers are 'generic', they will work almost equally with early stage or existing groups and with trading or non-trading groups.

**Figure 7: Typical support available for rural communities in Scotland (from Local Authorities, LEADER/LAGs, Third Sector Interfaces and National Organisations)**

**Typical support available for rural communities anywhere in Scotland (LA, LEADER/LAG, TSIs and National Orgs)**

What kind of groups do you support?



## **Conclusions**

- 4.9 *Nationally* we found thematic and specialist support - for community woodlands, tourism projects, community ownership projects, community halls, and many others. Apart from SCVO/Rural Direct we did not find other sources of national generic advice (i.e. not thematic or specialist) on available funding.
- 4.10 *Locally* there is, in each Local Authority area, a Third Sector Interface (TSI) reporting that they can be a one-stop-shop for funding advice - and also local authority advisers and (in smaller volume) LEADER advisers with broadly similar remits.

Third Sector Interface partners can be called a one-stop-shop in the sense that:

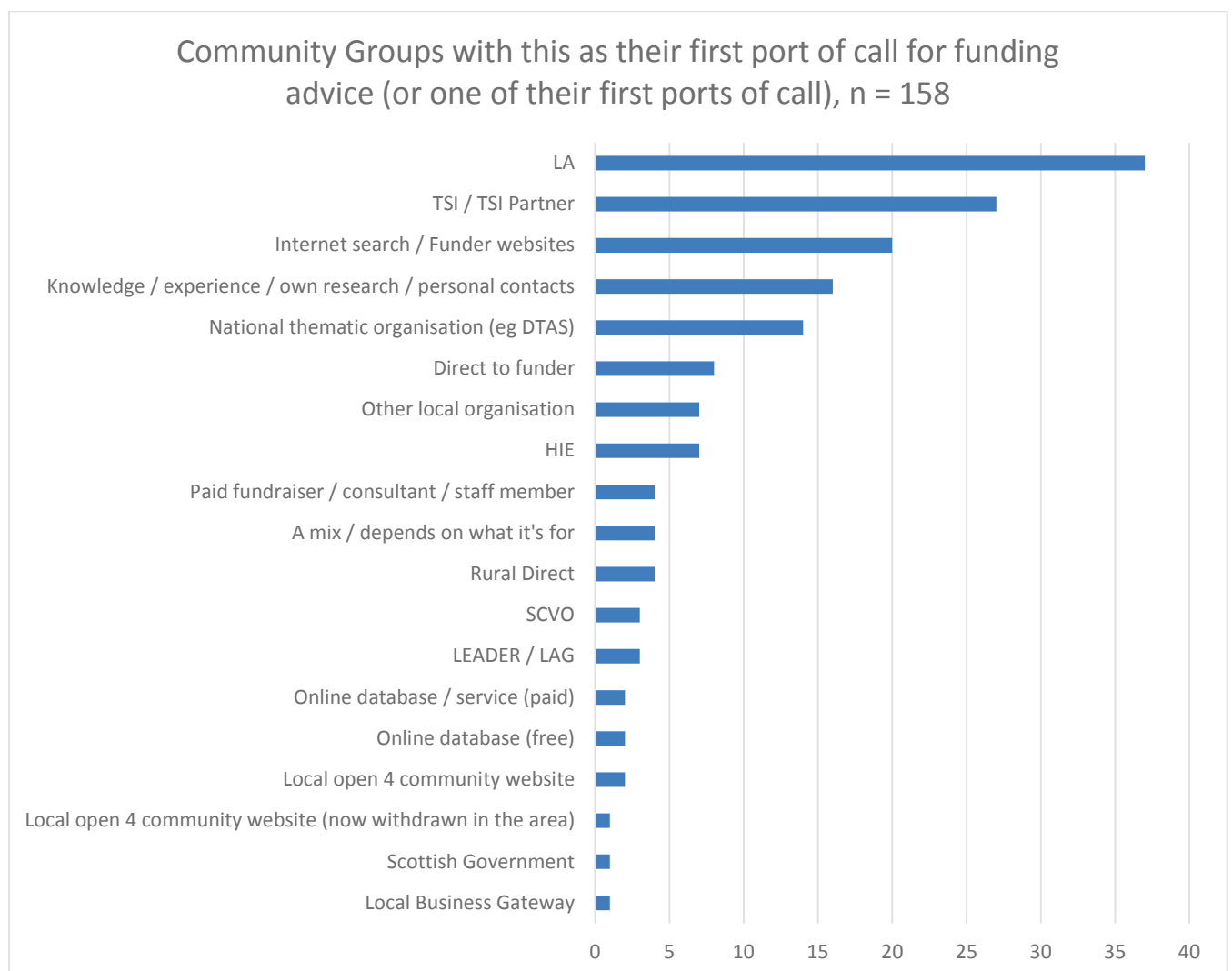
- They offer support in roughly equal balance to groups who are trading and non-trading or who are early stage or existing groups (although some partners are very specific in only working with non-trading groups reflecting that some infrastructure bodies will only work with volunteer based groups).
  - They offer all seven types of funding advice and support that we examined. They more consistently offer this full range than any other type of support provider we looked at.
  - They offer this through the full range of methods including one to one support, networking, events, resources and training. They more consistently offer this full range than any other type of support provider we looked at.
- 4.11 We did find local providers with specialist services too; for example, one organisation which specifically only supports existing social enterprises.
- 4.12 The support offered by TSI partners, but also national and other local support providers almost always involves no charging from any advice provider, even those reporting high levels of one to one support. At the same time, many providers say they have some issues with availability of support as the funding they receive is not enough to provide the capacity to respond to all the requests they receive.



## Which support providers do community groups prefer and use?

- 4.13 Responses to an open question asking community groups to name their first port of call for funding advice were categorised by organisation type (Figure 8 overleaf: note that where respondents expressed an equal preference for a number of sources these were all included). Overall, there was a wide range of responses but Local Authorities and Third Sector Interfaces (or TSI Partners) were the providers most commonly cited.
- 4.14 Other common responses were either general internet searching / investigating funders' websites, personal knowledge and experience or national thematic organisations, such as Development Trusts Association Scotland and Local Energy Scotland. A small number of respondents (four) cited Rural Direct as their first port of call, with a further three citing SCVO. LEADER / LAGs were also only cited by a small minority (three respondents).

**Figure 8: Community groups' "first port of call" for funding advice**



- 4.15 Our research also suggests that the ‘cluttered landscape’ itself is encouraging some groups (who have a specific project idea and know which funders are relevant to them) to go straight to funders for funding support and advice:

*“We have always consulted funders ourselves and think this is probably the best way to proceed, after reading all the available and pertinent information on the internet.”*

At the workshop consultation at the Scottish Rural Parliament, the point was raised that **the funding advice landscape appears as complex as the landscape of available funding**, so it is appealing to go straight to funders for advice.

- 4.16 We also asked community groups to list their main source of support for each of the seven areas of funding advice and support, to better understand preferences and awareness of provision. These were then collated and categorised – in the same manner as above – to describe the type of support community groups use and from where. These are presented below.

#### ***Advice and information on which funders may have relevant funding***

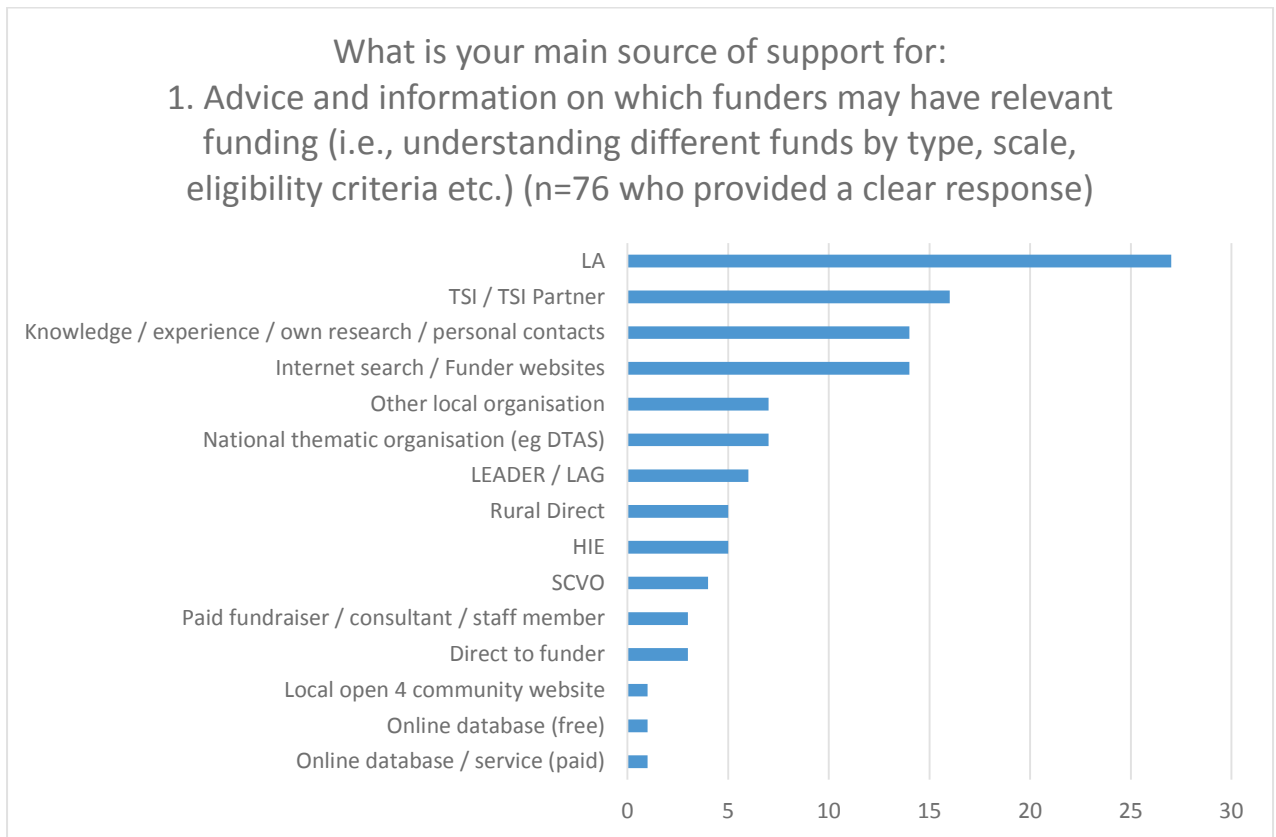
- 4.17 Local Authorities were the most cited first point of contact about support for advice and information on relevant funders, with Third Sector Interfaces (or TSI partners) listed second (Figure 9 overleaf). Many respondents cited their own knowledge or experience / contacts as being their main source of support, i.e. informal support only. Notable comments on this were:

*“Much of this has been trial and error and learning from experience.”*

*“Internet - trying to find it. There's no central point.”*

- 4.18 It is worth noting that SCVO’s new Funding Scotland service may now be able to fill a gap in terms of this type of advice, but no respondent specifically mentioned this newly launched service.

**Figure 9: Community groups' main source of support for advice and information on which funders may have relevant funding**



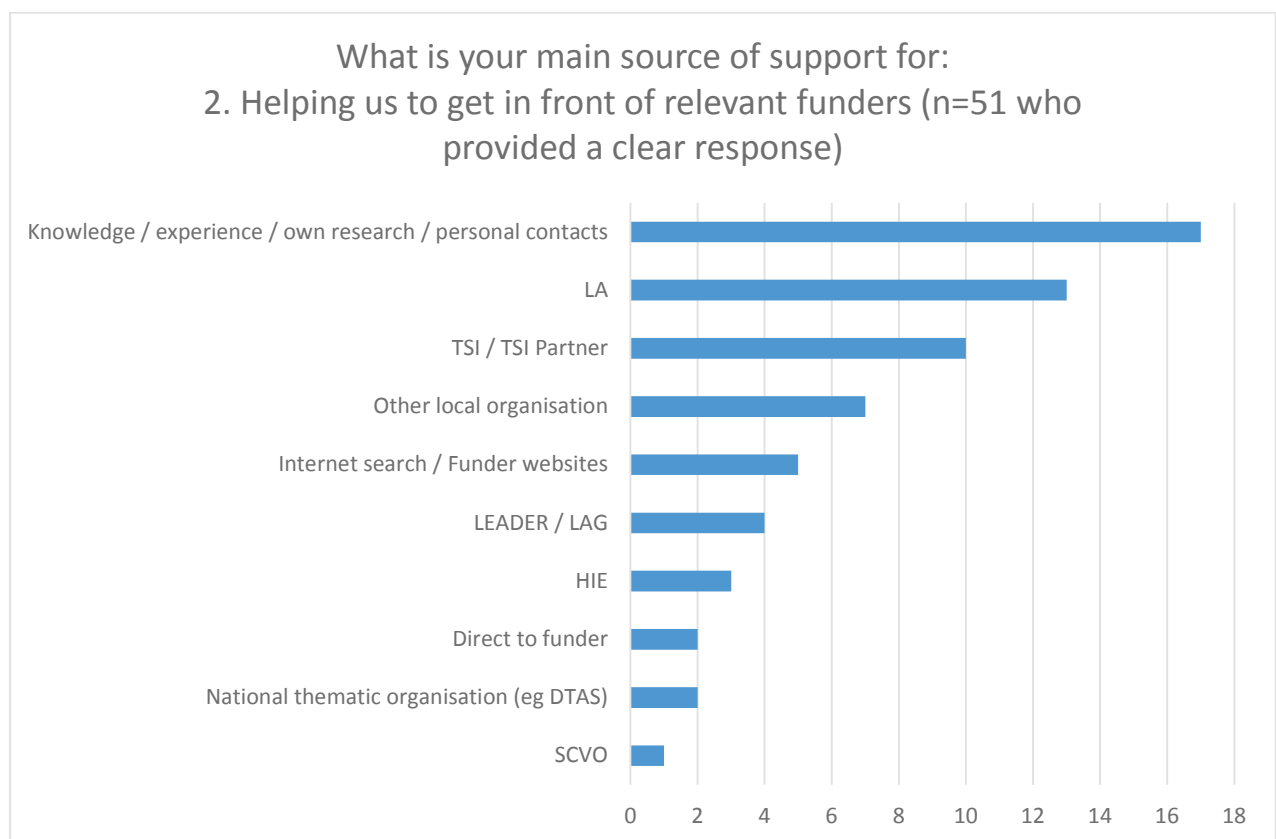
### **Helping us to get in front of relevant funders**

4.19 The most commonly cited source of support for help to get in front of relevant funders was ‘own experience or own action’ (Figure 10). Some people said that this was not particularly a problem, and one respondent said this may be related to groups’ levels of confidence:

*“Me - no real problem getting in front of funders, perhaps only lack of confidence in groups.”*

*“Direct approach and persistence.”*

**Figure 10: Community groups’ main source of support for help to get in front of funders**



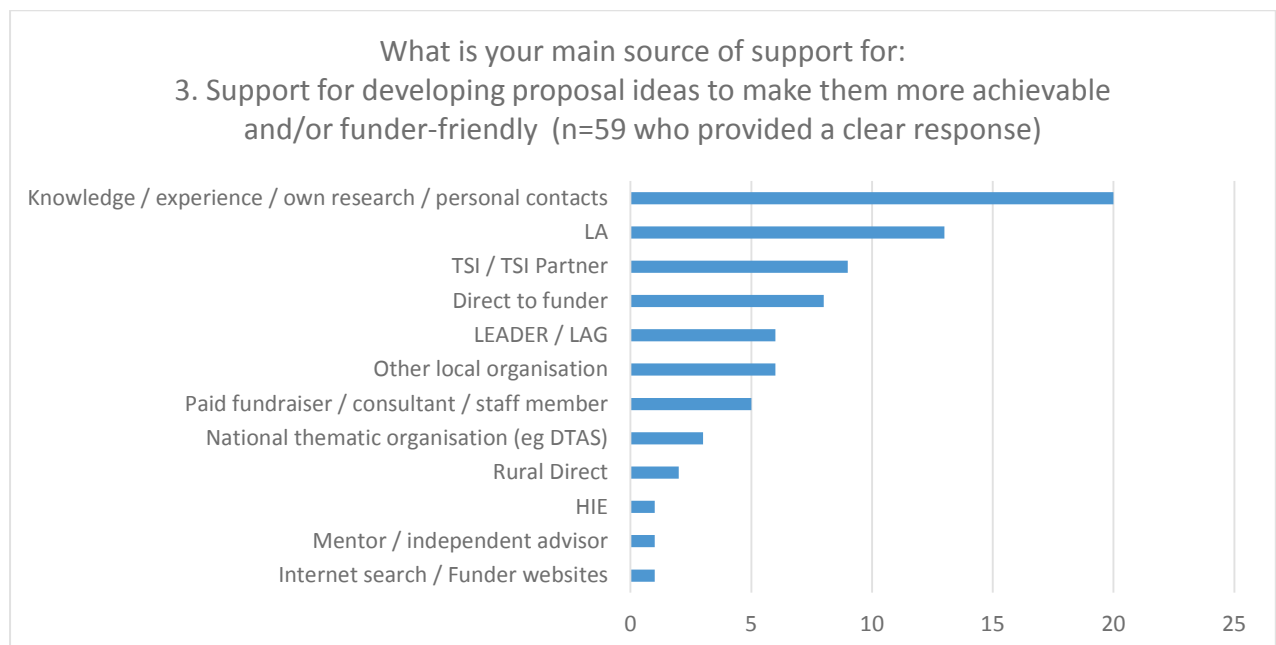
**Support for developing proposal ideas to make them more achievable and/or funder-friendly**

4.20 Again, in this area personal knowledge and experience / contacts comprised the main type of support (i.e. informal support only, Figure 11). One respondent clearly found this very challenging:

*“Me - fundamental in successful projects is to get them 'fundable' and a major problem for many community groups - I spend lots of time on this.”*

4.21 Only one respondent noted that they would go to a mentor or independent (non-paid) advisor, though 5 respondents noted that they would use a consultant.

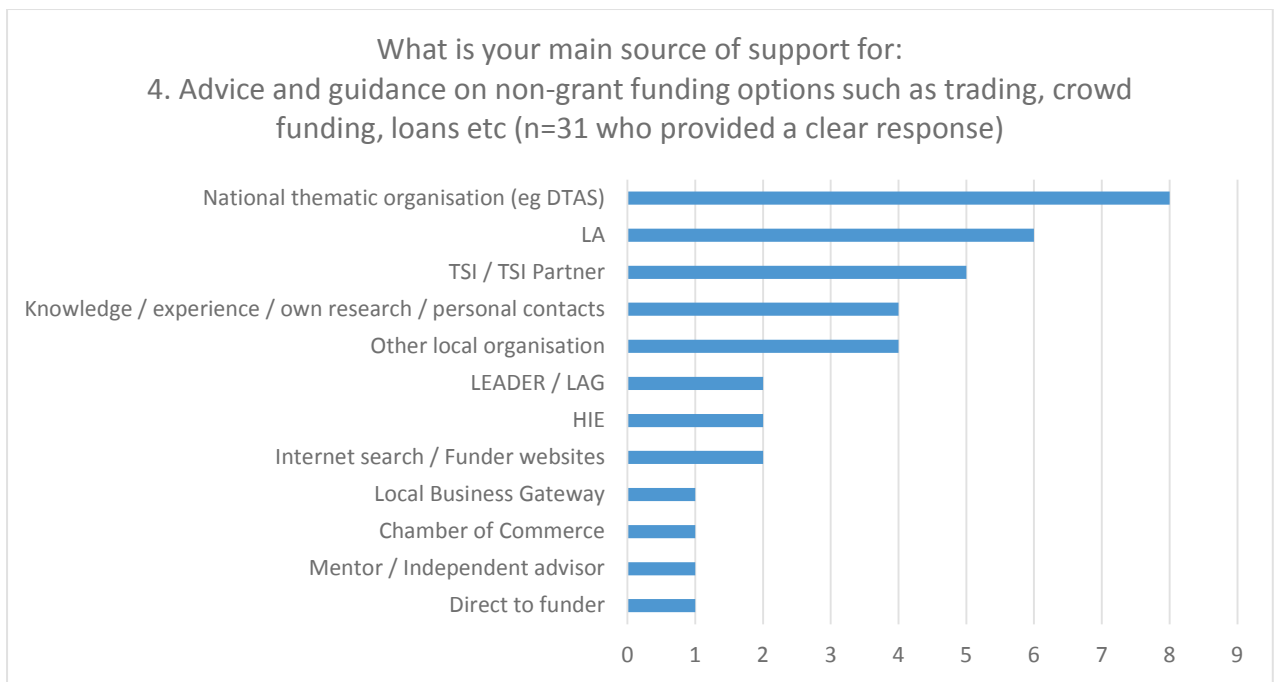
**Figure 11: Community groups’ main source of support for developing proposal ideas to make them more achievable**



**Advice and guidance on non-grant funding options such as trading, crowd funding, loans etc.**

4.22 There were notably far fewer respondents who gave a named source of support for advice and guidance on no-grant funding options (Figure 12). Interestingly, unlike for other types of support, national thematic organisations were most often cited for support in this area, indicating the specialist nature (or the perceived level of specialism) of this type of support.

**Figure 12: Community groups' main source of support for advice and guidance on non-grant funding options such as trading, crowd funding, loans etc.**



### Support to undertake feasibility studies and/or write business plans

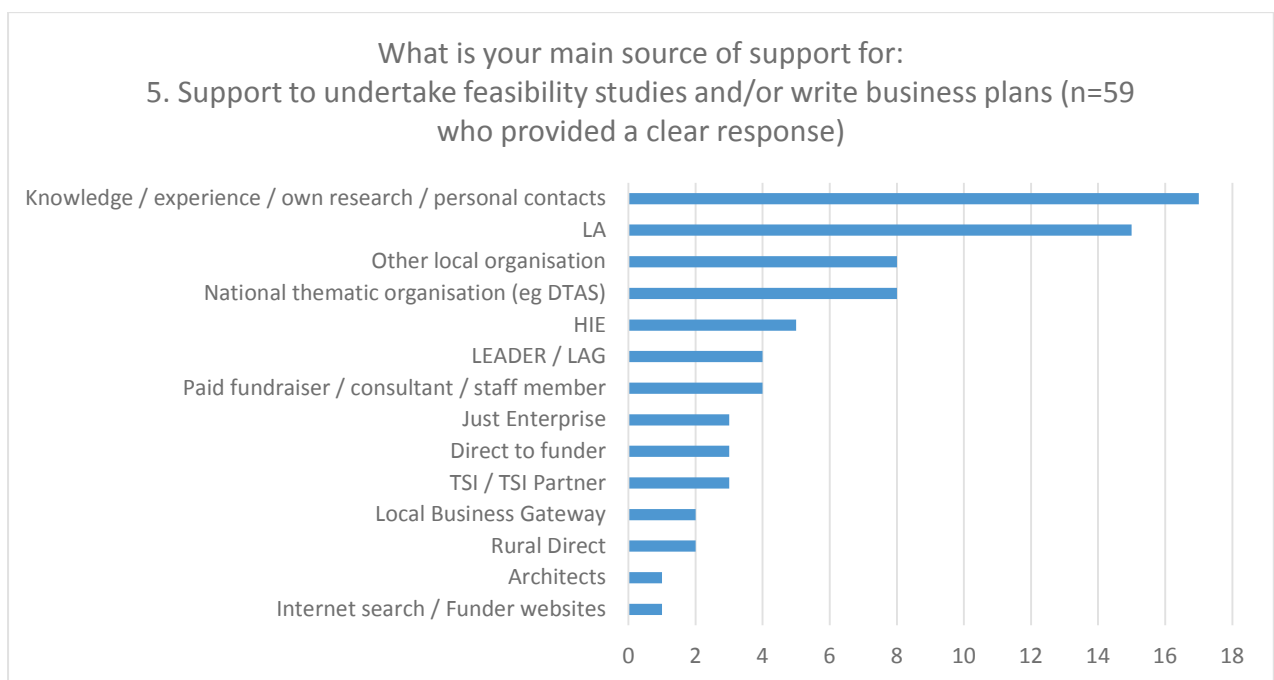
4.23 As for other types of support, community groups often cited their own knowledge and experience / contacts as being most useful for undertaking feasibility studies and/or writing business plans (Figure 13 overleaf). Local Authorities were next most cited. Again, a number of respondents said that they used paid consultants for this, with one respondent indicating that this is what they need:

*“It’s not SUPPORT we need to undertake feasibility studies and write business plans, it’s the funding to contract in the support we need for this!”*

4.24 Just Enterprise was cited by a small minority of respondents for advice and support to undertake feasibility studies and/or write business plans: this is the only time they were cited against a particular form of support.

4.25 We note that TSI/TSI partners were only cited by three respondents for support to undertake feasibility studies and/or write business plans. This is at odds to TSI advisors reporting that they provide support across the board, including support to undertake feasibility studies and/or write business plans.

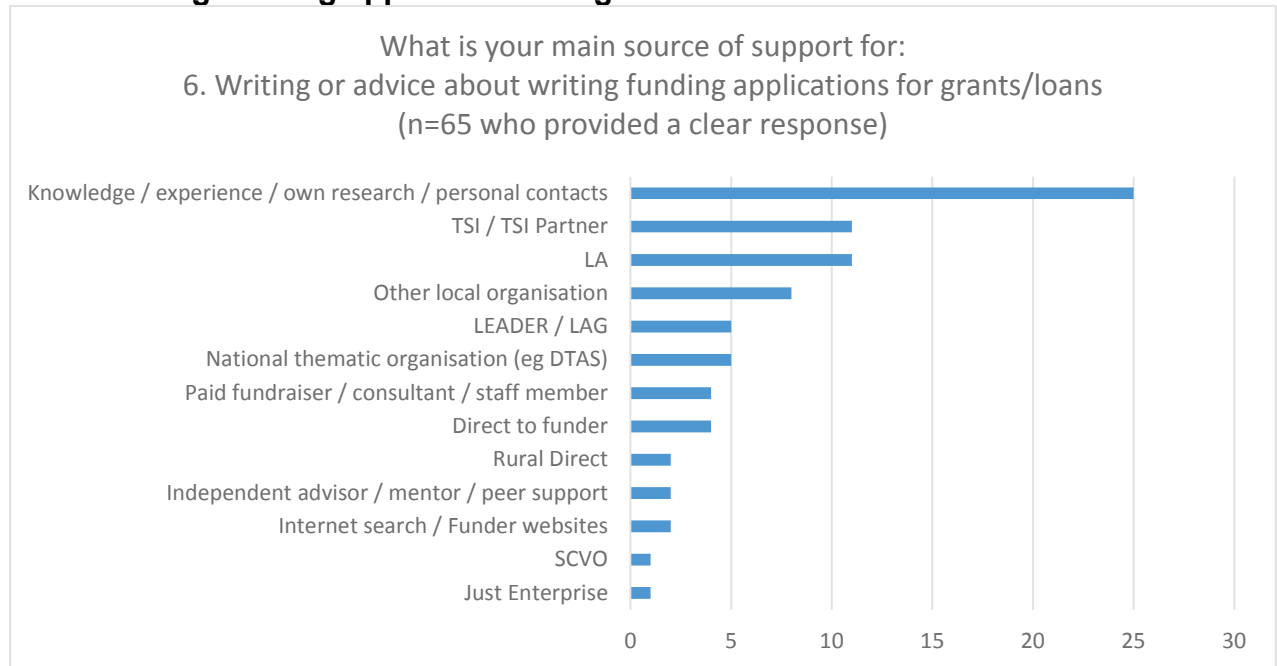
**Figure 13: Community groups’ main source of support for undertaking feasibility studies and/or write business plans**



### **Writing or advice about writing funding applications for grants/loans**

4.26 As for other areas of support, knowledge and experience featured highly in this area, along with a spread of other support, especially from Local Authorities and TSIs / TSI partners (Figure 14).

**Figure 14: Community groups' main source of support for writing or advice about writing funding applications for grants or loans.**





**Training to increase our community group's capacity in terms of bid writing, project development, governance/leadership or specialist skills**

4.27 In terms of advice around non-grant funding options, only a small number of respondents were able to provide a named source of support for training (Figure 15 overleaf). Unlike for all other areas of support, TSI/TSI partners were the most often cited by community groups as their main source of support for training.

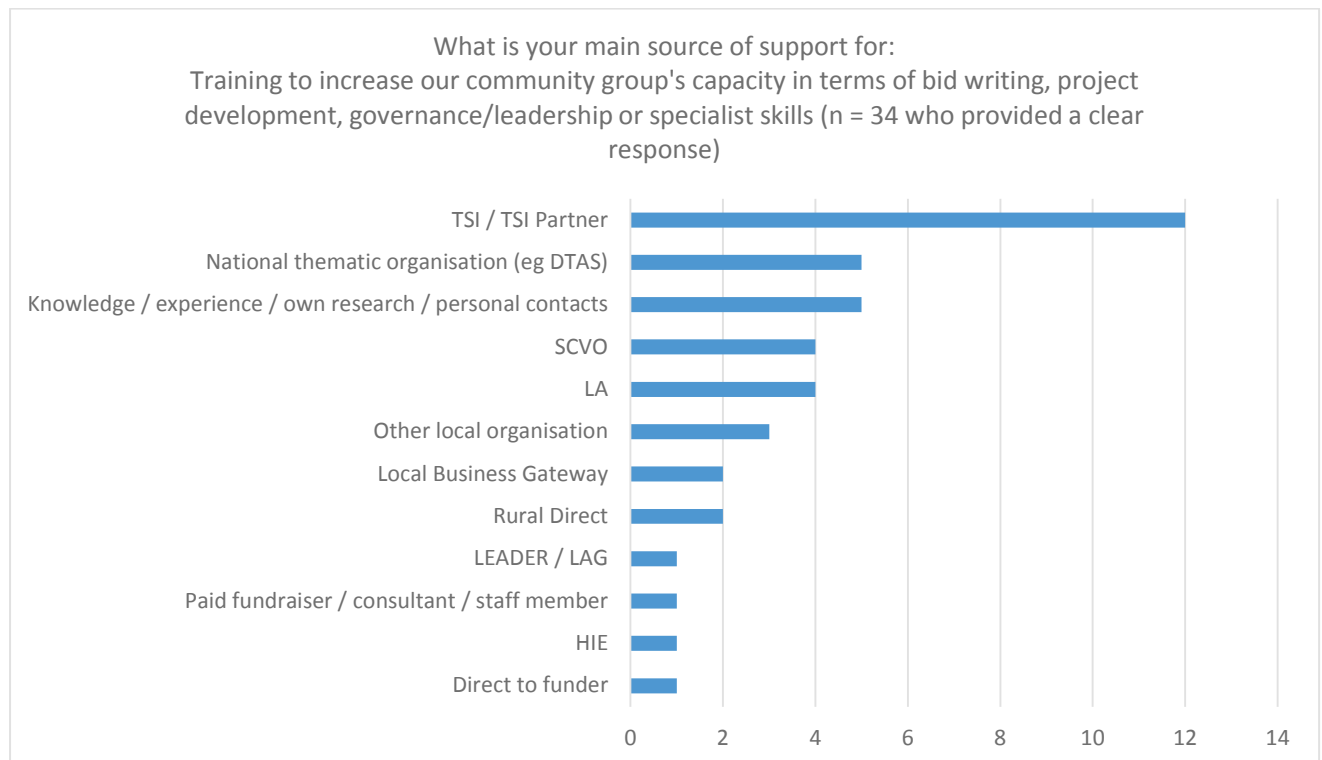
4.28 A number of respondents instead emphasised that they do not have time for, or do not need, training, for example:

*“There's enough experience in our community to do this stuff – it's the time, and attracting the people to help out, which is a problem.”*

*“We don't need training to do this. We all work full-time. We need funding to hire a development officer. This would massively increase our capacity!”*

*“It would be much preferable if the application procedures could be simplified and made more transparent, then less training would be required.”*

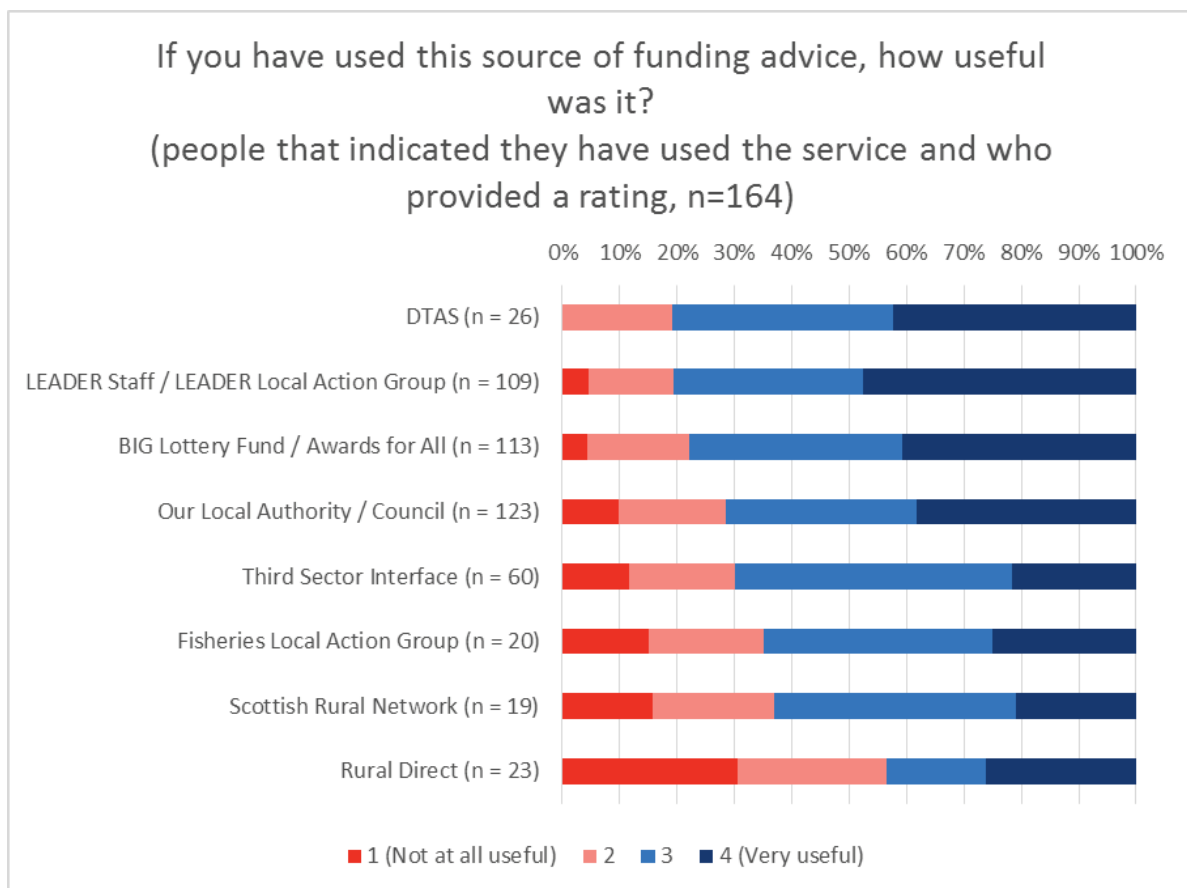
**Figure 15: Community groups’ main source of support for training to increase capacity, in terms of bid writing, project development, governance/leadership or specialist skills**



### Community groups' overall ratings of the support they have received

- 4.29 Along with providing information on the *sources* of support that community groups would turn to, respondents indicated how *useful* they have found the support from these sources.
- 4.30 Figure 16 shows these ratings, ranked by the proportion of people who rated support 'quite useful' or 'very useful'. Although the sample size of those who rated Rural Direct is very small, it received particularly mixed responses. LEADER staff / Local Action Groups received good ratings from a large number of respondents. Third Sector Interfaces received moderately good ratings, but had the lowest proportion of users rating the support from TSIs as "very useful", suggesting that there is room for improvement in making TSIs a consistently high quality source of support.

**Figure 16: Community groups' ratings of the support they have received from different types of advice provider**



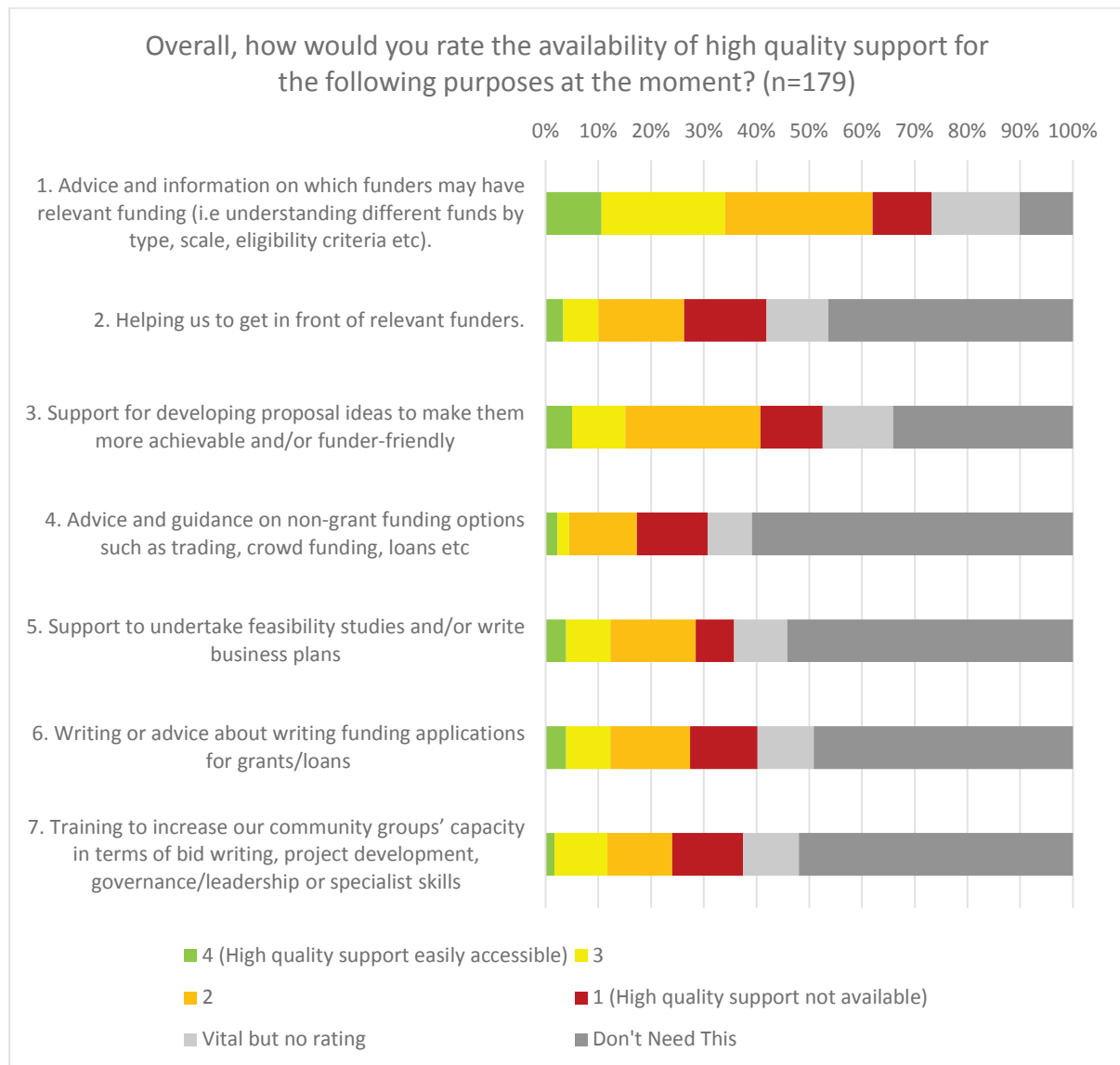
## Reflections with funding advice providers on the research around what support is available

- 4.31 At the two advice provider workshops we reflected on these findings about the level of support that is available to rural community groups. Participants were surprised at the estimated number of staff in each Local Authority providing funding advice identified by the research.
- 4.32 In both workshops, a strong theme emerged around the importance of the *quality* of support provided. The approach that this research has taken has been to map available support with limited investigations into the quality of provision (with the exception of Rural Direct, which was a particular focus of the work, Chapter 5). Participants felt it was particularly important to note that, while Third Sector Interfaces reported in our consultation that they are able to provide advice across all areas listed, the quality of that support is extremely variable. It would be wrong to conclude from our mapping that there is a sufficient capacity of expert support that is universally available to rural community groups across Scotland.
- 4.33 There was some surprise that Local Authorities were seen by community groups as their first port of call. For some community groups, we suspect that these responses may be related to them using Local Authority funding alerts as the first port of call about sources of funding – and this may also be to do with the close connection between LEADER and Local Authorities.
- 4.34 Participants also raised the importance of building personal relationships with advice providers, and emphasised that within organisations there will be variable quality of provision, with more able, skilled or knowledgeable advisors being highly sought after by community groups.
- 4.35 A significant point raised by providers was that *the main under-used source of support was drawing on the experience of people in communities who had taken forward a project*, and learnt about how to do this and how to raise money for it. A key conclusion reached was that one of the main areas of potential for the future was to find ways of enhancing appropriate peer to peer support.

## 5 REFLECTION ON NEEDS AND CURRENT SUPPORT: WHERE ARE THE GAPS?

5.1 Figure 17 draws together the research described in the previous chapter on community groups' needs and available support. In it we present community groups' overall ratings of the availability of high quality support over the seven identified areas of funding advice and support.

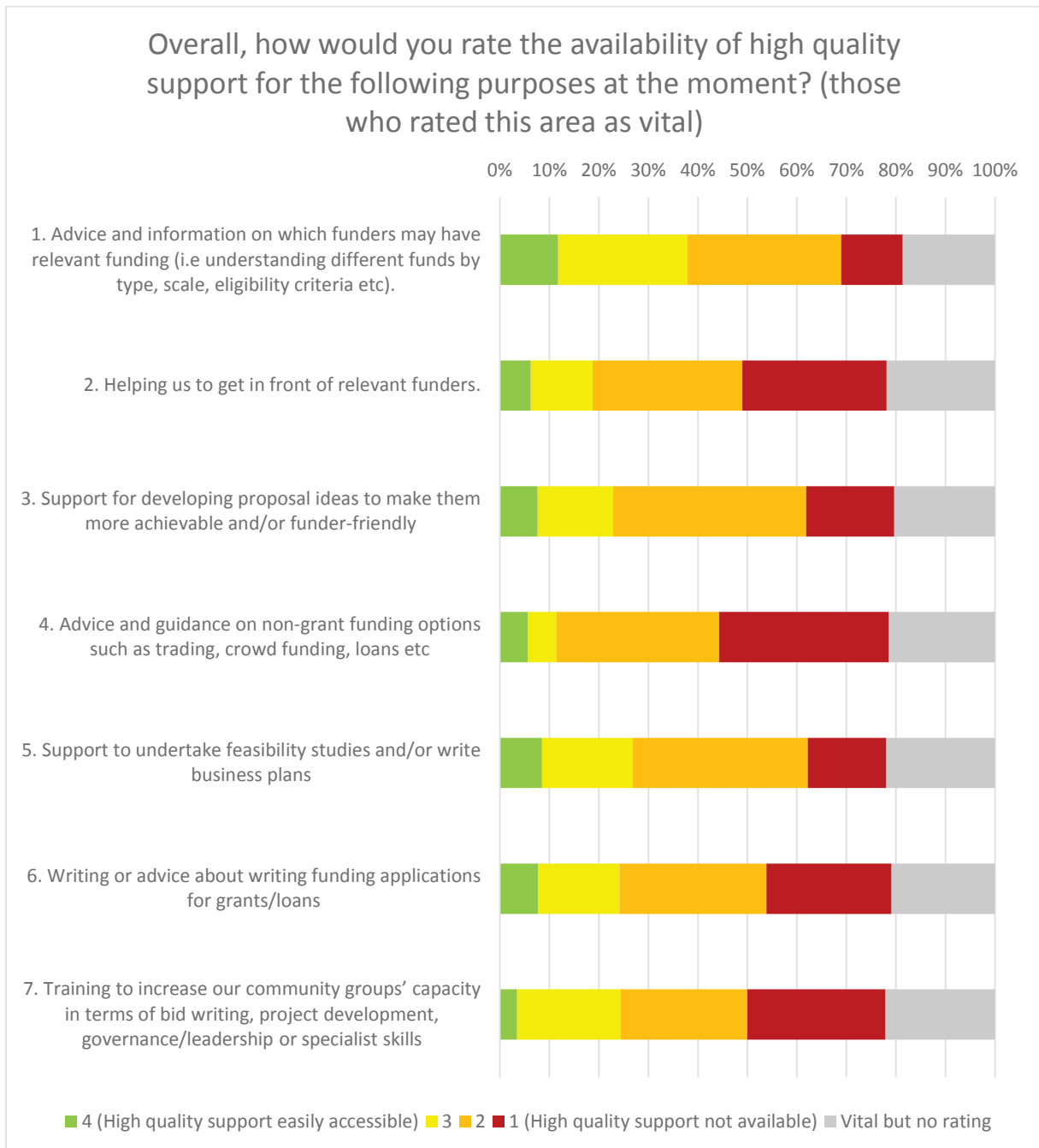
**Figure 17: Community groups' ratings of the availability of high quality support**



5.2 Clearly, needs are complex and diverse. All the categories were considered 'vital' by at least ~40% of respondents. Furthermore, across all categories, community groups do not feel that their needs are being met with high quality support; fewer than 50% of people who said something was vital to groups like theirs and rated the support felt that it was of high quality (i.e. rated the availability of a high quality of support as 3 or 4).

- 5.3 Advice and information on sources of relevant funding was the most sought after area of help, and this was also the highest rated in terms of availability of high quality support (but still less than 50% rating as 3 or 4).
- 5.4 Similarly, fewest people thought that advice on non-grant funding options is vital, and this was the lowest rated in terms of availability of high quality support (15% of those who said this was vital and who rated support rating this as 3 or 4).
- 5.5 Help to get in front of relevant funders was also poorly rated (24% of those who said this was vital and who rated support rating it as 3 or 4). This association between the demand for services and the perceived quality of the services may simply reflect the extent to which providers are experienced and knowledgeable.
- 5.6 Figure 17a overleaf omits those who felt they did not need each service. This shows the availability of high quality services more accurately – with all services except advice and information scoring under 30% for quality (ie rated as 3 or 4).

**Figure 17a: Community groups' ratings of the availability of high quality support (omitting those who felt they didn't need the service)**



## Reflections with funding advice providers on the research around gaps in support

5.7 At the two advice provider workshops we reflected on gaps in support with advice providers. Some participants were surprised to see that, with such a wide array of support available, community groups' needs were not being met. While some delegates stated that community groups may have exaggerated what they feel they need, others said that advice providers may also have exaggerated what they are able to deliver.

5.8 Again, a key concern for participants was around the issue of quality. In particular, delegates at one workshop were keen to point out that community groups' answers in Figure 17 could be a result of three things:

- A genuine lack of high quality support
- Community groups' lack of awareness about existing high quality support
- Community groups' lack of access to high quality support of which they are aware.

It is not possible to use our research to tease out the relative importance of these three possibilities, but there is evidence of all three explanations being true to some extent:

- At the two workshops delegates reported that the quality of support provided is variable (for example, within and between Third Sector Interfaces)
- As we shall see in Chapter 5, many community groups were unaware of the range of services offered by Rural Direct
- Community groups cited transport difficulties in accessing events which they felt would be useful to them.

5.9 We emphasise that the issue of reported *variable quality of provision*, and how this consideration should supplement the mapping work in this research, was central to our reflections in the workshops and is reflected in our final recommendations.

## 6 RURAL DIRECT

### Profile of Rural Direct

- 6.1 Rural Direct is funded by the Scottish Government and delivered by SCVO. It is a national funding advice and support service for rural community groups or community enterprises at any point in their journey from idea development to programme delivery for any type of project (including community energy, youth groups, social enterprise, community transport, asset transfers). While being nationally available, many aspects of the service were delivered locally. In Orkney and Shetland, Voluntary Action Orkney and Voluntary Action Shetland staff delivered aspects of the Rural Direct service locally.
- 6.2 While Rural Direct has been an open, generic, national service, other national providers are thematic (e.g. Development Trusts Association Scotland or Community Woodlands Association or Community Shares Scotland), and much provision of funding advice and support services is at a local level (e.g. including but by no means limited to LEADER or Third Sector Interfaces). Any future provision must take specific account of the National Rural Network's work as a network.
- 6.3 The merit identified by Rural Direct of a national programme supplementing the existing provision from the "cluttered landscape" of providers is that it is able to:
- Draw on learning and examples from across the country
  - Provide some degree of lobbying, advocacy and policy work at a national level
  - Have a single national brand and so help to enhance awareness.
- 6.4 The support that Rural Direct has been offering over 2009 – 2014 has changed a little each year and has been scaled back in more recent years while the Scottish Government reviews its funding strategy. As an indicator of the level of funding that Rural Direct received, Scottish Government contributed £254,388 in 2012/13, the last year in which Rural Direct received funding for the whole service rather than just the database.
- 6.5 In general the focus of the work has been in offering one to one advice to community groups through development officers. It has also produced resources (online and offline), provided an 0845 helpline number for funding issues, supported local funding advice services, and delivered training, events and roadshows.



- 6.6 SCVO has produced quarterly monitoring reports of Rural Direct's activity and outcomes. These were structured around particular target outcomes, which changed somewhat over the years, particularly between 2011/12 and 2012/13 (see Figure 18) when eight key performance indicators (KPIs) were introduced. Generally, activity in the earlier years had a greater focus on raising the awareness of the Rural Direct service itself and about SRDP funding, while later years had a more general focus and included the provision of a database to signpost community groups to all the available sources of funding advice in their area.
- 6.7 Awareness raising activities included e-newsletter dissemination, circulating leaflets, press articles and radio interviews. Rural Direct also provided training (training packages, briefings, and training events) for both funding advice providers and for community groups. In 2011/12 Rural Direct worked with "community groups, funding organisations, Third Sector Interfaces and Local Authority staff" to plan and deliver Rural Direct Roadshows across Scotland. These roadshows provided community members a chance to meet and talk to "funders and other experts" about access to funding.

**Figure 18: The changing outcomes of Rural Direct**

<b>Rural Direct outcomes</b>	<b>Financial Year</b>					
	<b>2008 /09</b>	<b>2009 /10</b>	<b>2010 /11</b>	<b>2011 /12</b>	<b>2012 /13</b>	<b>2013 /14</b>
High level of awareness and understanding among rural community groups (and other voluntary sector organisations) of a range of funding opportunities including SRDP and the support available to access it, including Rural Direct.						
High level of awareness and understanding of a range of funding options for rural communities including SRDP and the role of Rural Direct (e.g. among relevant public and voluntary sector organisations)						
High level of engagement of Rural Community Groups with the widest possible range of funding opportunities including SRDP						
Successful applications for funding, including SRDP, by Rural Community Groups						
Smooth transfer of Rural Direct functions in the crofting counties from Crofters Commission. (CC)						
Engagement of Rural Community Groups with Rural Direct						
Maximise support for community groups accessing and claiming SRDP and other funding						
Build capacity and improved governance in rural community groups						
Provide an information hub and first point of contact for rural communities seeking advice on a range of issues and topics						
Ensure that good practice from and lessons learned about the current SRDP are captured and used to inform the development of the next programme						
Pilot community climate change resilience work, in partnership with Adaptation Scotland						
Ensure that rural communities, LAGs and the third sector play a key role in the development of the next SRDP						
Provide publicity on Community Right to Buy and the work of the Land Reform Review Group						
Provide a clear route map for rural communities seeking information and guidance on funding and support available, through maintaining and updating the Rural Direct Database						

- 6.8 Rural Direct has provided a service to help community groups understand policy changes. For example, Rural Direct reported an increase in their helpline’s activity in the quarter October-December 2009 related to the Rural Priorities Services and Facilities option being transferred into the LEADER programme and the subsequent impact on community groups who had already submitted a funding application.
- 6.9 Understanding the scale of interaction of the whole Rural Direct service is challenging, because of the ways in which the service has evolved between 2008/09 and 2013/14. SCVO reported on the number of events and community groups engaged with its service on a quarterly basis. Some of the ways in which this information was reported, particularly in the first few years of delivery, is not easy to interpret. As an example, between 2008/09 and 2011/12, reporting of one-to-one advice sessions between Rural Direct development officers and community groups to discuss funding options, emails to provide a community group information and a “telephone call enquiry about the position of the application for funding” were reported under the category of “awareness-raising events”, as were discussions between Rural Direct and funding advice providers. These “events” therefore vary widely, in both their nature and their intensity. In 2012/13, reporting was altered significantly and aligned closely to eight KPIs.
- 6.10 In terms of the scale of active engagement with community groups, by the end of quarter 2 in 2012/13 (when reporting on this changed) there were 1,110 community groups which SCVO reported had received a high level of assistance / were actively engaged with the service (Figure 19). Much of this active engagement appears to have focused on support to access SRDP funding, although the sharp rise in engagement in 2011/12 was due to the inclusion of community groups who were actively engaged by attending Rural Direct roadshows, at which they met “funders and other experts” about access to funding.

**Figure 19: The number of projects/groups engaged with Rural Direct, with a step change in 2011/12 associated with increased reach through roadshows**

	Financial Year				
	2008/09	2009/10	2010/11	2011/12	2012/13 (by end of Quarter 2)
No of active Community Projects / Community Groups receiving information and advice from Rural Direct	346	258			
<b>Cumulative</b> number of Community Groups Assisted			486	1,019	1,110

6.11 We tracked the scale of the offer provided by the national 0845 helpline by assessing quarterly reports (see Figure 20). In 2009/10 – the time of peak activity regarding the helpline – the service was receiving just under one enquiry per day. In 2012/13, this was much lower, at just one call every five days.

**Figure 20: The scale of the number of enquiries to the Rural Direct helpline**

	Financial Year				
	2008/09	2009/10	2010/11	2011/12	2012/13
Enquiries to Rural Direct Helpline	136	297	263	256	78

6.12 The email subscription list size for Rural Direct communications grew to over 1,500 groups/individuals in 2012/13. The latest estimate of scale is that the survey as part of this research was sent by SCVO to 1,621 email addresses on the Rural Direct database who SCVO believed were beneficiaries of their services. The Rural Direct newsletter currently goes to 2,258 email addresses.

6.13 For quarters beyond quarter 3 in 2012/13, information was recorded against the new KPIs. The distinction between different elements of support in these reports helps to show the full range of activities undertaken by Rural Direct, and the number of different groups that the service engaged (e.g. community groups, third sector interfaces and LEADER Local Action Groups). A further service that Rural Direct has been involved with in the last two years is the KeyStone quality award and management toolkit for people who manage village halls and community buildings<sup>3</sup>.

6.14 Example outputs are shown in Figure 21 overleaf - this shows that the scale of the service has reduced somewhat, especially in terms of people using the telephone helpline service.

<sup>3</sup> <http://www.scvo.org.uk/running-your-organisation/professional-networks/village-halls/keystone/>

**Figure 21: Profile of recorded outputs in 2012/13 and 2013/14**

	2012/13		2013/14	
	Q3	Q4	Q1	Q2
<b>1. Maximise support for community groups accessing and claiming SRDP and other funding</b>				
Number of community groups supported for SRDP and/or non-SRDP funding	114	62	69	79
Number of other groups supported (e.g. LAGs, public sector groups)	15	8	14	20
Number of training events run in person	4	4		2
Number of training events run by phone				
Number of training events run online, as webinars	1	2		
<b>2. Build capacity and improved governance in rural community groups</b>				
Communications, information and briefing provided to TSIs and other national and local support organisations	4	5	5	11
Meetings and other engagement with TSIs and other local support organisations	9	15	22	15
Training and information events run with TSIs and other local and national support organisations	15	4	1	2
KeyStone: Number of groups registered	53	6	5	5
KeyStone: Number of mentors trained	64	0	0	0
KeyStone: Number of awards	7	2	0	2
<b>3. Provide an information hub and first point of contact for rural communities seeking advice on a range of issues and topics</b>				
Number of subscribers to email newsletter	1658	1597	1562	1560
Number of telephone inquiries	21	12	9	7
Number of email inquiries*	32	22	11	8
<b>6. Ensure that rural communities, LAGs and the third sector play a key role in the development of the next SRDP</b>				
Number of facilitated workshops	1	2	5	0
Briefing papers on consultation on new programme			2	0
Presentations delivered on consultation on new programme			5	0
Articles, blogs and social media updates	6		5	3

## Awareness of Rural Direct

### Awareness amongst Community Groups

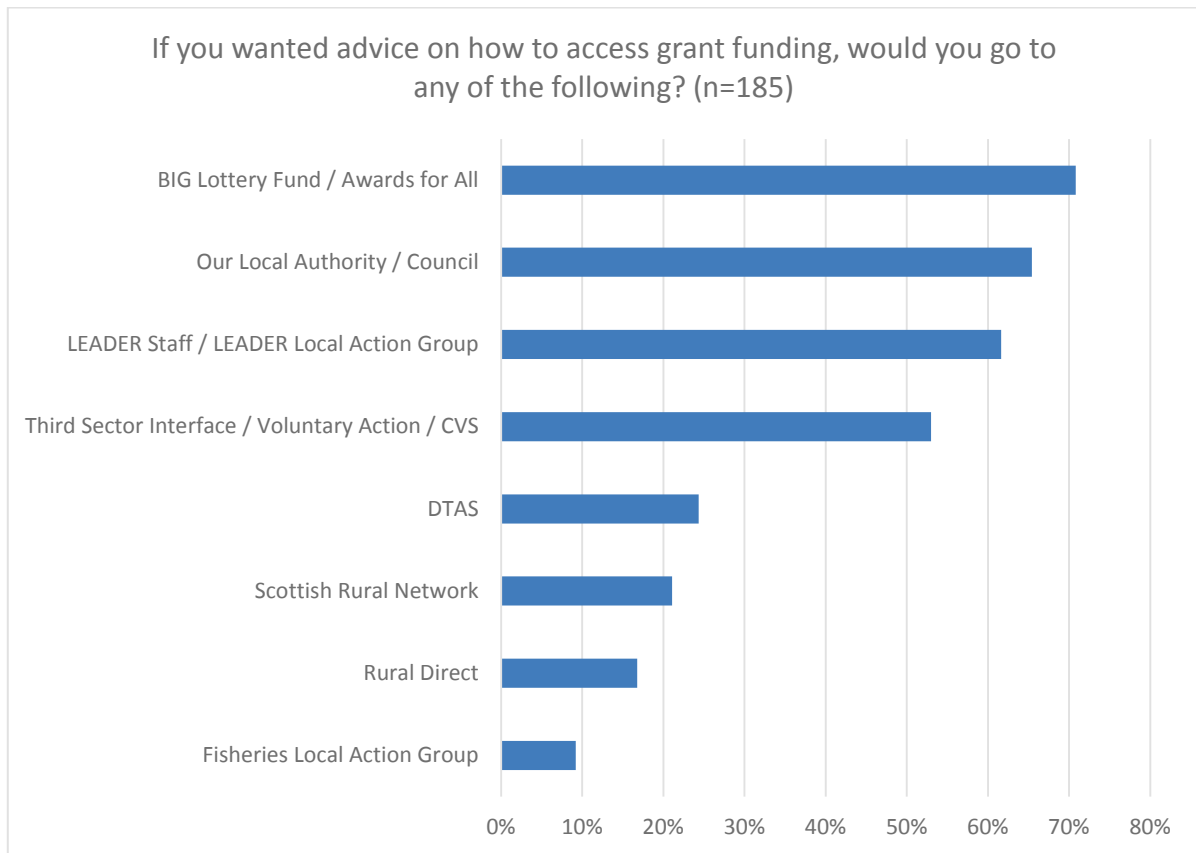
- 6.15 We gathered evidence on the awareness of Rural Direct among community groups through online survey, telephone interview and paper surveys completed at the Rural Parliament workshop.
- 6.16 First, we asked respondents to name sources of funding and advice and support that they were aware of. This may be considered an unprompted query of how many respondents included Rural Direct in their response. Of 165 respondents, seven (4%) mentioned Rural Direct unprompted, while 24 in total (15%) mentioned SCVO.

**Figure 22: An unprompted query about awareness of Rural Direct – asking community groups to name sources of funding advice and support of which they were aware.**

	# of Responses	Proportion of respondents (n = 165)
Mentioned Rural Direct (total)	7	4%
Mentioned SCVO (total)	24	15%
Mentioned SCVO and Rural Direct	3	2%
Mentioned one of SCVO or Rural Direct or Rural Network	32	19%

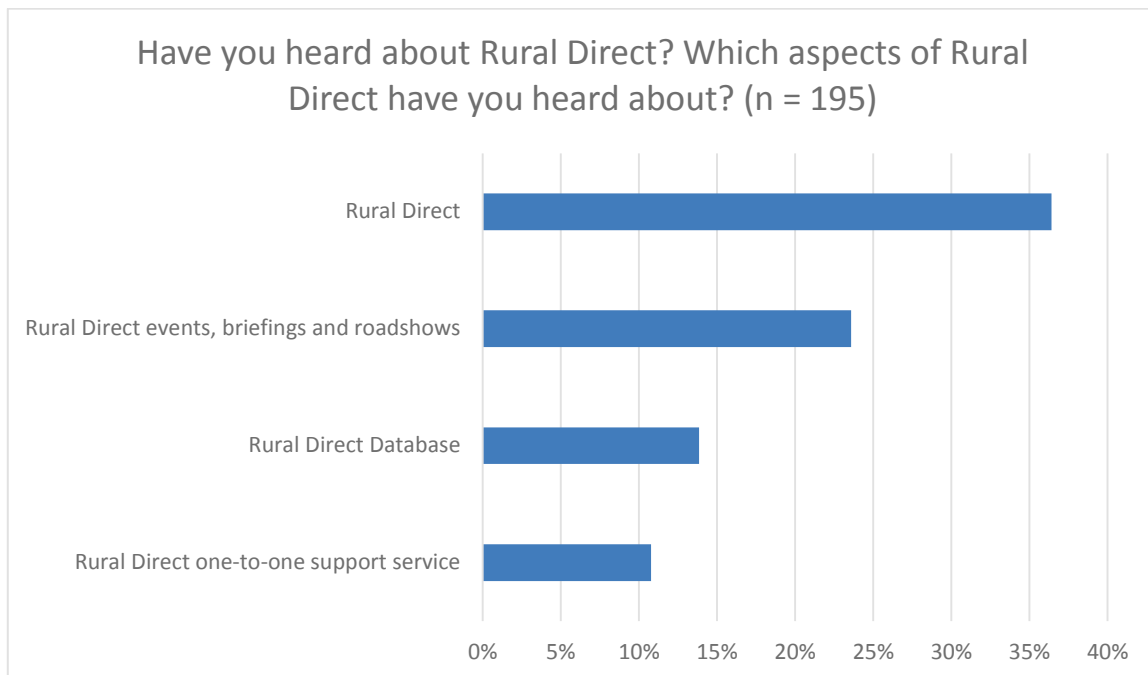
- 6.17 Although very few respondents cited Rural Direct, this may be related to the fact that Rural Direct has not been fully operational in recent months. Due to this possibility (i.e. that respondents may have in the past cited Rural Direct but now forgotten about it) we also tested awareness of Rural Direct by asking community groups if they would use Rural Direct for funding advice, amongst a list of other funding advice services. Of 185 respondents, 31 (17%) said that they would go to Rural Direct (Figure 23 overleaf).

**Figure 23: A second test of awareness of Rural Direct – would community groups go to Rural Direct for advice and support?**



6.18 In a third question, community groups were asked directly if they had heard of Rural Direct and if they had heard of specific elements of Rural Direct’s support (Figure 24 overleaf) . In this case, more than one third (36%) of respondents indicated that they had heard of Rural Direct. This is much higher than for other tests of awareness, but still represents a minority of respondents. Groups were most aware of Rural Direct’s events, briefings and roadshows, with only 11% of respondents being aware of Rural Direct’s one to one support service.

**Figure 24: A third, direct test of awareness of Rural Direct**



6.19 Overall, these results indicate that most groups (i.e. potential Rural Direct customers) are not aware of Rural Direct. However, as we identified earlier in this report, there is a deeper problem that many do not know that any funding advice and support exists: many were not aware that LEADER or their Third Sector Interface might offer this – and some had heard of neither. This both makes the case for a national service – providing a single easily recognised brand – and also undermines the case for the existing service as there is still low awareness after five years of delivery.

6.20 However, It should be noted that current low levels of awareness do not prevent Rural Direct being an asset or nationally important, especially given the fact that the service has been scaled back.

### ***Awareness amongst Advice Providers***

6.21 As well as consulting community groups, we also asked advice providers about their awareness of Rural Direct. Most (75% of 99) respondents had heard of Rural Direct but a smaller proportion (35% of 65) had made referrals (i.e. directed community groups to Rural Direct) in the past (Figures 25 and 26 overleaf).

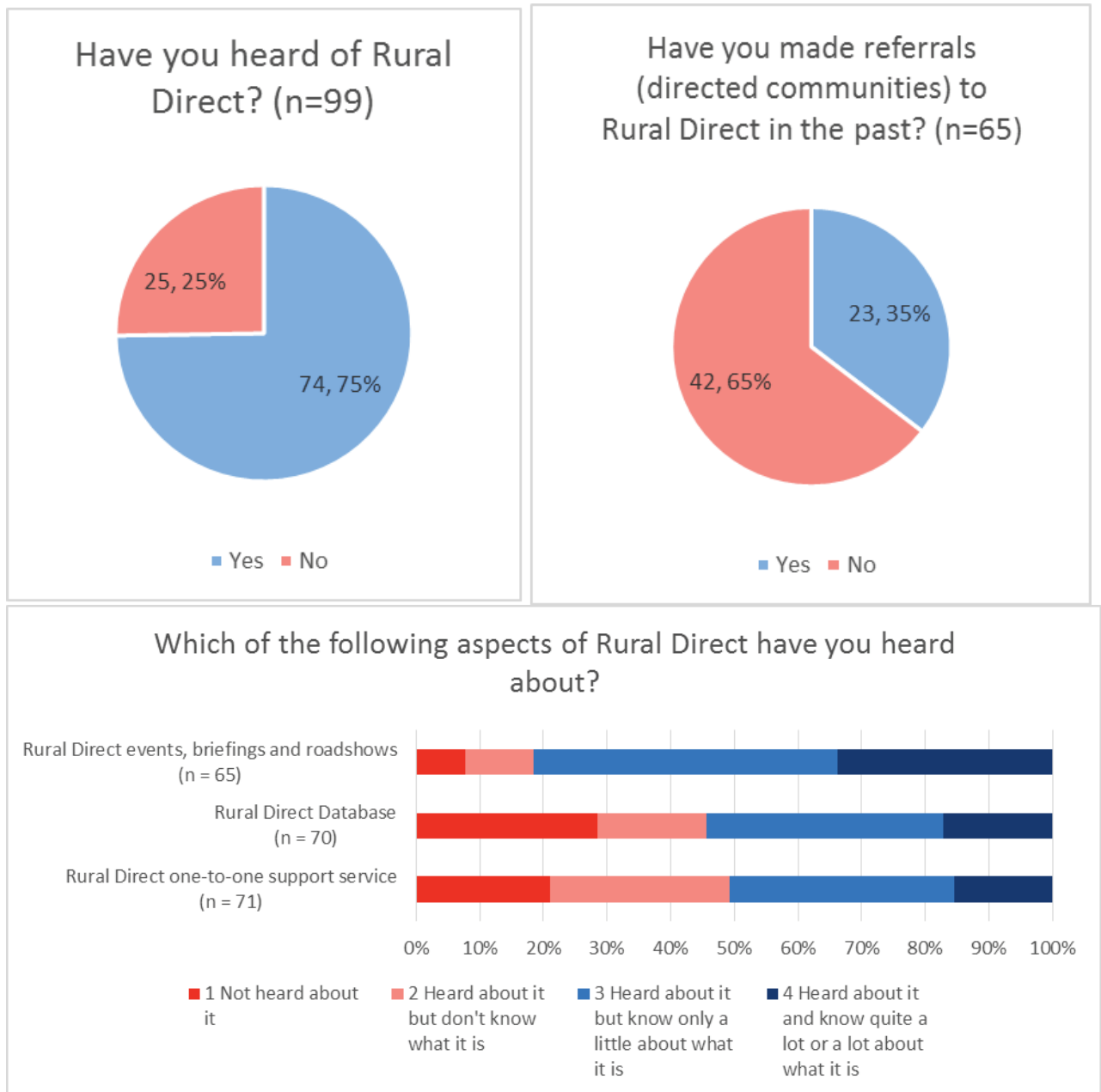
6.22 In terms of the extent of knowledge about different aspects of Rural Direct, respondents were most likely to say that they knew at least a little bit about Rural Direct’s events, briefings and roadshows, with around half of respondents indicating that they didn’t really know much about what the Rural Direct database or what Rural Direct’s one-to-one service is.



6.23 We note that one respondent was confused about Rural Direct and the National Rural Network, saying

*“[I] found the relationship to National Rural Network and the National Rural Network website etc. confusing - how was Rural Direct different?”*

**Figures 25 and 26: Advice providers’ level of awareness of Rural Direct, and whether they had made referrals to Rural Direct**



## Feedback on Rural Direct

- 6.24 We have gathered evidence of the quality and reach of Rural Direct support from community groups and advice providers.

### **Feedback from Community Groups**

- 6.25 Of community groups who had heard of Rural Direct, 29 provided a response about the strengths and weaknesses of Rural Direct. This is a small proportion of the overall sample, suggesting that few people had felt able to comment on Rural Direct.
- 6.26 Responses were very mixed. Five respondents (17%) gave a positive response, eight (28%) a negative response and four (14%) a mixed review. A further 38% said that they didn't know enough about the service to comment. These responses are shown below.
- 6.27 Positive responses described staff as being knowledgeable and the service as being responsive and focused, for example:

*“Responsive and focused.”*

*“Staff are very knowledgeable and have a range of information at their fingertips. We don't often get this kind of direct support to rural communities.”*

*“Rural Direct staff were ahead of the game when we had issues with SRDP projects.”*

- 6.28 Some negative responses cited frustration at the online site, and lack of appreciation that the service was more than a website, for example:

*“Unable to find what I needed on the website. I have found the site to be hard to navigate and gave up.”*

*“It is difficult to navigate the website and understand where information that is relevant to your needs might be. It is also difficult to ascertain how to get support, and what kind of organisations are eligible for support. Until this survey I had not appreciated I could just pick up the phone to someone and ask.”*

Another respondent echoed this point about a lack of information about what the service delivers:

*“Not advertised widely enough. Didn't know about the database. Not present at many of the sector events I've attended. Thought they were more signposting than actual support.”*

Other comments cited frustration with contact with Rural Direct staff's responsiveness and knowledge:

*"I spoke at a conference for Rural Direct a few years ago and asked for a rep to come out and meet with us and after a few phone calls I gave up."*

*"An extremely unhelpful service with dis-interested staff unless they had an existing relationship with you. Staff unsure of the facts and information that they were giving out - not well trained. Staff making biased decisions."*

One respondent said that the service was not focused and its role unclear:

*"A little 'all things to all people'. Duplicating work of local organisations. Confusion re social enterprise remit."*

- 6.29 Mixed reviews echoed the conflicting viewpoints cited above. Notably, one respondent cited the helpfulness and expertise of staff but said they perhaps did not have capacity to be accessible:

*"...his (and other staff's) expertise excellent and greatest strength. Areas of weakness perhaps accessibility as they were hugely busy."*

Issues of duplication were cited, and again the need for greater advertising of the service:

*"The staff are always helpful, though the information often duplicates that from other sources."*

*"I think Rural Direct is a good idea but perhaps needs to be advertised a bit better. Needs to be more prominent."*

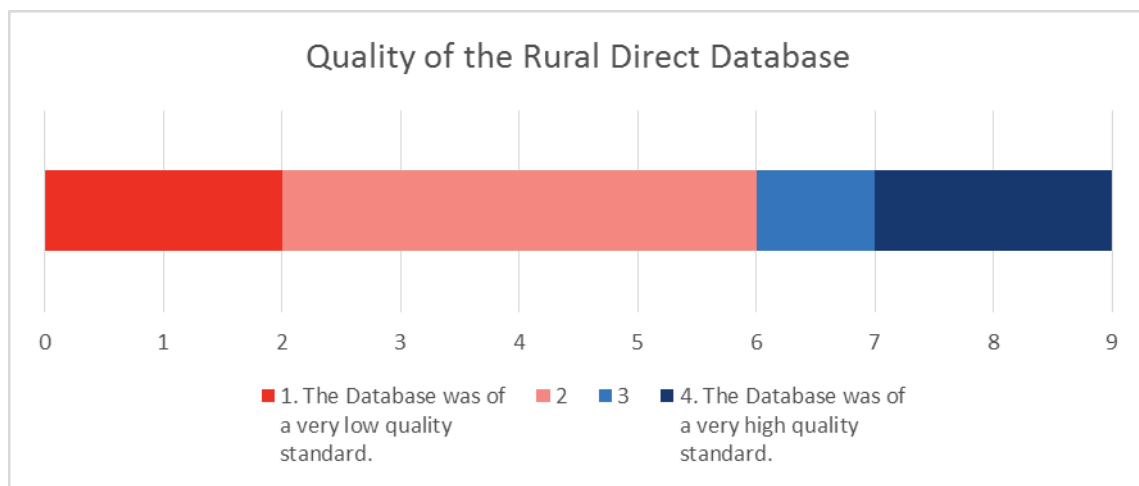
Roadshows were cited as being helpful and informative:

*"Roadshow very helpful and informative, e-newsletters are one of many so often not able to read them due to other time commitments."*

### Feedback from Other Advice Providers

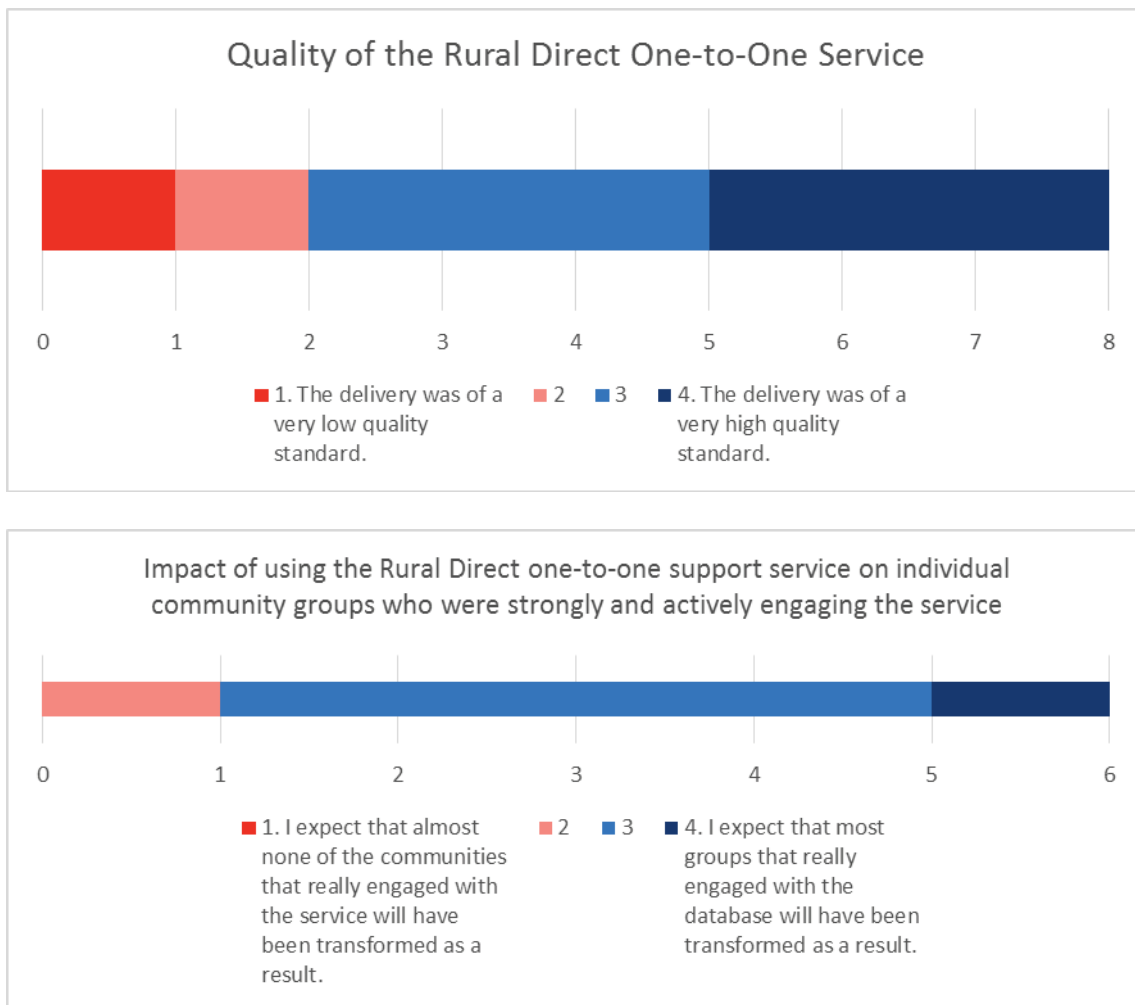
- 6.30 Advice providers were asked (online survey, one-to-one interview) to give opinions about the quality of elements of the Rural Direct service. Only a small set of respondents provided answers on these questions, suggesting that respondents did not feel able to comment on the quality. Unfortunately this means that it is difficult to draw a high degree of confidence in advice providers' opinions of the service; the views of the small sample who responded are shown below.
- 6.31 Regarding the Rural Direct database, there was a mix of views amongst the small sample who responded, but the majority of the small sample rated the quality as either 1 or 2 out of 4 (Figure 27).

**Figure 27: Advice providers' view of the quality of the Rural Direct database (Sample 9)**



- 6.32 Regarding Rural Direct's one-to-one services, responses were much more favourable amongst the small sample who responded, with the majority of the small sample rating this as 3 or 4 out of 4 (Figure 28 overleaf). We also asked advice providers about the level of impact they thought that the service had had on community groups who were strongly engaged with it – again, responses were positive overall from small sample.

**Figure 28: Advice providers' view of the quality and impact of the Rural Direct one to one service (Sample 8 and 6)**



6.33 Advice providers were also asked for any final comments about Rural Direct in terms of its importance, quality and impact. 21 respondents provided a view, with four giving a positive review, five giving mixed reviews and 12 giving mostly critical reviews. Positive reviews referenced support for an individual organisation around accessing SRDP funding, useful briefings and dedicated support for rural communities, and comments on the staff being approachable and good to work with, for example:

*“We have had one to one support in Midlothian for one organisation from Rural Direct and this was in connection with SRDP funding. This specific support was extremely helpful and did make a real difference to the organisation in terms of its ability to access the funding.”*

*“Briefings useful and dedicated support for rural communities also useful”*

- 6.34 Notable amongst mixed reviews were the following remarks, which highlighted a mix of quality in delivery, including positive remarks about the database and some examples of groups “gaining something” from working with Rural Direct, but also more negative experiences of support from Rural Direct.

*“The [organisation] team responded in a variety of ways. Some had not referred clients to Rural Direct and some, when they did, felt that the support was inadequate. Others found that the clients gained something. This was mainly around SRDP support rather than in general funding terms.”*

*“My one experience of working with a group which received support from the service was actually quite negative I’m afraid to say... on the other hand the roadshows which attempted to de-mystify SRDP and raise awareness of funding opportunities could be useful if properly done in conjunction with support agencies on the ground”.*

*“The National database is helpful in showing groups what others have achieved, but I still believe deploying a local worker via the Rural Partnership or Local Authority would be more cost effective and provide timeous help in terms speed, time and project development and have a local along with national knowledge”*

- 6.35 Amongst more negative reviews, the service was described as “*patchy, incoherent and generalist*”; as “*working in a vacuum*” and giving “*misinformation...to groups causing delay and frustration for the applicants*”; and as being “*not relevant to very rural areas*”. Other remarks said that the database is “*not good enough...scanty info*” and that Rural Direct had “*not really had the reach it might have had*”.

- 6.36 The general impression from the comments is that there has been some value of the service noted, especially around the SRDP programme, but that the service has been “*patchy*” and not fully integrated with local delivery to the extent that other local organisations would have liked. This impression was explicitly stated by one respondent:

*“Useful re specialist advice on SRDP but support was often limited to technical advice rather than support to the applicant, which was provided locally by either LA or CVS.”*

## 7 VIEWS ON FUTURE OPTIONS

- 7.1 For a view on future options for a national source of advice on funding, all advice providers were given a brief outline of what Rural Direct is and asked to comment on whether they thought that, if Rural Direct were to continue in this vein, it would duplicate the services that they provide. Specifically, we said:

*“Rural Direct is a service designed to help rural community organisations to access funding from a range of sources including the Scotland Rural Development Programme (SRDP). Rural Direct is a national service delivered locally by the Scottish Council for Voluntary Organisations (SCVO). If Rural Direct, as described above, continues, to what extent will this duplicate work you are already doing?”*

- 7.2 Qualitative responses were collated and explored. Responses varied: from those who identified a problem with duplication, for example:

*“It duplicates our work locally, and confuses stakeholders.”* – TSI / TSI Partner

*“This seems a complete duplication of the TSI structure in Scotland. I'm not sure why you would fund SCVO to undertake work which would be better suited to delivery through this network.”* – TSI / TSI Partner

*“Substantial duplication”* – Local Authority,

...to those who felt that the service is complementary and adds value to what they can provide, for example:

*“Complementary - Rural Direct reaches a particular client group”* – Local Authority

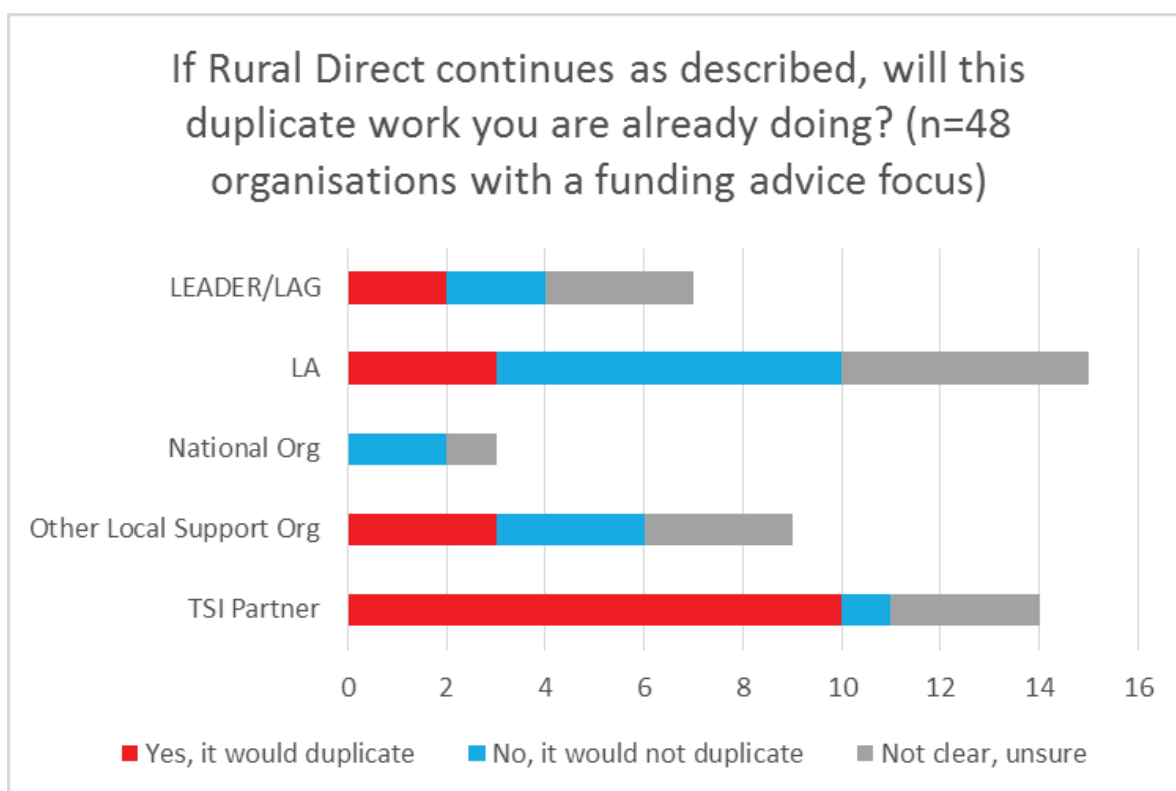
*“Will only add value to what the BID is doing”* – Business Improvement District (Other Local Support Organisation)

Generally, responses indicated that the service needed to be better integrated with local delivery and understand local gaps in delivery:

*“If Rural Direct continues then it needs to talk openly to other funding advice providers in the areas to see where it can be of most benefit. It also needs to keep its lines of communication open.”*

7.3 Overall, there appeared to be a marked difference in responses from different types of organisation. We therefore cross-referenced responses against organisation type of respondent and found a clear distinction. Most notably, it was primarily Third Sector Interfaces or their partners who noted a duplication in the remit, whereas Local Authorities were far more likely to say that the service would be complementary or add value to their provision (Figure 29).

**Figure 29: Different types of advice providers' view on whether Rural Direct would duplicate the services they are providing**



7.4 We asked advice providers (online survey, one to one interviews):

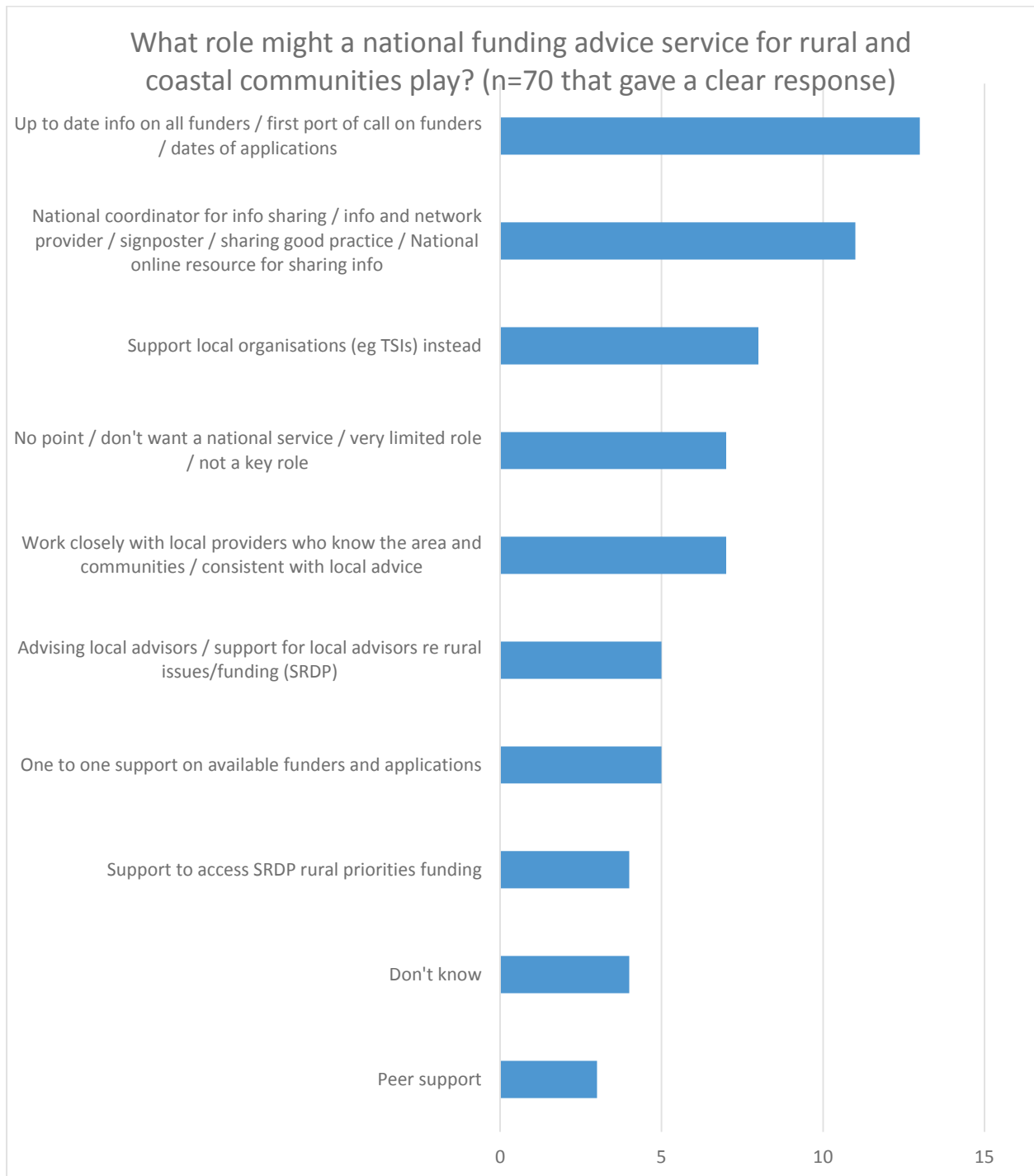
*“What role might a national funding advice service for rural and coastal communities play?”*

Open responses were collated and categorised into broad groups. There was a wide array of responses, with no common consensus. However, the most common categories (those with 5 or more respondents) are shown in Figure 30 overleaf.

7.5 There was a high degree of interest in a national source of advice on all available funders, giving advice on what funds are available and dates for applications etc. Some respondents would not have been aware of SCVO’s Funding Scotland website, which may now be filling this gap. One respondent who was aware of Funding Scotland suggested that it should be bespoke for rural and coastal groups.



**Figure 30: Advice providers' views (collated and categorised from open responses) on the possible roles for a national funding advice service.**



- 7.6 There was an expressed need for the service to either work closely with existing local organisations, or for the service to be delivered by these local organisations (such as Third Sector Interfaces). Some respondents suggested that the service could support or train local advisers; some respondents suggested that the service could provide additional specific knowledge around specialist areas, such as SRDP.

*“SRDP advice is very specialist and giving really strong, specialist support is essential.”*

- 7.7 There was also an identified need for a role in information sharing and networking, and a need to “join things up”, for example:

*“If they facilitated exchange of good/bad practice across the whole of Scotland (not just regionally) that would be useful. Organised, themed rural conferences/exhibitions for example.”*

*“Most important is local resource and there is a need to join more things up.”*

- 7.8 We note that there was a small number of respondents who suggested that the service should provide one to one support to community groups in terms of funding applications. Others echoed this by saying the service should add capacity to other local delivery.

- 7.9 Other notable comments were about the importance of peer support, cited by three respondents, for example:

*“Communities empowered to do things themselves - peer support most useful.”*

...and also the importance and value of roadshows.

- 7.10 The advice providers’ workshops identified the need for a national service to have a small number of important functions:

- Promoting the TSIs as the local ‘first port of call’ for communities seeking advice on funding.
- Enhancing and assuring the quality of local advice service by developing and promoting a quality assurance programme for advice staff – notably of TSIs which were seen as the obvious local first port of call.
- Maintaining a central database of information about sources of funding which could be drawn on by these front line advisers.
- Ensuring that the network of specialist national providers (such as Community Energy Scotland and the Community Woodlands Association) are effectively promoted through the TSI network.

- 7.11 This was complemented by support for a local service which was built around TSIs in each Local Authority area, and specifically their role in promoting and brokering peer to peer support.
- 7.12 The issue was raised about whether there needed to be a distinctive funding advisory service for rural areas – in other words, with the needs of communities in terms of advice and support differing little between rural and urban areas, should there not just be a similar service available across the whole of Scotland. In general, there was an anxiety that ‘a service for all’ would end up being dominated by demand from urban projects and groups, and so there was a need for a dedicated service for rural communities if they were to be a focus for support. We consider this in developing our recommendations in chapter 9.

## 8 CONCLUSIONS

- 8.1 Rural community groups' **needs** in terms of advice and information on funding are complex and diverse, with some groups requiring intensive one to one support and others reporting that infrequent support is more suitable. Advice providers also emphasised that community groups often "*don't know what they don't know*", meaning that the required level of support may be higher than community groups have suggested in this research.
- 8.2 Across a wide range of areas of advice and support, rural community groups did not feel that their needs are met by currently available support. Areas of support which were less frequently required by community groups were advice and information on non-grant funding options such as crowdfunding/loans etc. and on training. Some community groups valued training and saw this as very important, while others had less interest in this than having others provide them with a service, based on their limited capacity as a volunteer.
- 8.3 The **provision** of advice and support around funding for rural communities is complex and diverse, with some identified risks of duplication of efforts amongst different providers, from Third Sector Interfaces, Local Authorities, LEADER groups, National thematic organisations and other local organisations.
- 8.4 Despite there being significant identified capacity for funding advice (which was questioned by advice providers), advice providers reported that the demands on them were high. Community groups' responses identified gaps in the availability of high quality support across *all* of the areas of funding advice and support that were suggested to them in our research. Reflections with advice providers suggested that this is likely to be due to a mix of:
- A genuine lack of high quality support
  - A lack of awareness amongst community groups of what support is available to them
  - Problems accessing support, even if community groups are aware of it.
- 8.5 The most significant source of capacity that was not currently being fully used was the experience, expertise and knowledge of those in communities with a history of successful project development and implementation. This related well to the high value placed on this source of support by communities and other providers. It was recognised that for this to work would require local resources in terms of brokerage and travel and administrative costs.

- 8.6 In general there was a consensus that the best source of advice and support would be a local one and the TSIs were identified as being the obvious source of this, having been established to 'provide a single point of access for support and advice for the third sector within the local area<sup>4</sup>'. However, to fulfil this role they would need support from a national service in terms of the quality assurance of advisory staff, the resources for the brokerage of peer to peer support and the expenses associated with this, and a single source of information about funding available for rural community projects.
- 8.7 Reviews of the Rural Direct service indicate that delivery has been "patchy", with some reports of a high quality service from knowledgeable staff with specific expertise around rural funding routes, and other more critical comments about a service which has not been focused, or not been accessible or of a high quality. The sample size of respondents (either community groups or advice providers) who gave an indication of their views about Rural Direct was small (notably lower than the number of responses to other questions).
- 8.8 Awareness of Rural Direct was low amongst community groups in the sample, even when taking account the caveat that Rural Direct has been scaled back (so not necessarily at the forefront of respondents' thoughts). Awareness amongst advice providers was much higher (75% of the sample who responded had heard of it), but the number of advice providers who indicated that they knew even a little about the nature of the service was low.
- 8.9 A number of community groups and advice providers remarked that the service has not been promoted well enough to help advice providers and community groups really understand what the offer is. According to monitoring data the level of awareness of, and engagement with, Rural Direct saw a step-change in 2011/12 after roadshows were introduced.
- 8.10 To some extent the reported confusion about Rural Direct's specific offer is unsurprising, given that the service has changed throughout its delivery period (evidenced by the changes in its required outcomes). These changes have reflected changes in the landscape of rural funding in Scotland.
- 8.11 Our main conclusions are that:
- There is a **sustained need for advice and information about funding opportunities for rural communities**. It does not make sense to replicate this in every area as many of the sources of funding are national or regional. There is a general view that the current databases available are very difficult to navigate.
  - In particular **there is a demand for one to one advice** which can either be provided face to face or at a distance: what is important is that the advice provider is able to relate to the particular circumstances of the community and its needs and opportunities.

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<sup>4</sup> <http://www.scotland.gov.uk/Topics/People/15300/Localism>

- In general, there is a ***strong preference for a locally based service*** – in terms of both accessibility and a better appreciation of local needs and context.
- There is ***a wide source of advice available*** in response to these needs, which seems to be facing significant demands. This advice focuses around Local Authorities/LEADER and the TSIs, but it is complemented by a range of specialist national providers of advice on specific topics.
- The main need seems to be to ***create some clarity about where the first port of call is in any area*** – and to ensure that behind this is a high quality service in terms of information and advisory staff knowledge, expertise and experience.
- The most commonly expressed view – and one that is consistent with intended purpose – is that ***the TSIs in every Local Authority area should be promoted as the first port of call***. However, it is clear that the TSIs will need to work very closely with their Local Authority and LEADER project to ensure that a locally coherent service is available for groups. Our research also suggests that there are issues about the quality of current TSI support and significant variation both between and within TSIs. This quality issue will need to be addressed. In addition, LAs and LEADER have an established presence in the market and a range of valued relationships which it will be important not to cut across.
- With many sources of advice and information facing significant demands ***the most underused resource appears to be the expertise and experience of those in community groups who have been through the experience of developing and successfully funding a project***.
- The roles that can best be carried out at a ***national level*** are:
  - Supporting the development of local partnership approaches in each LA area for communities seeking information and support on funding to ensure that local availability and access is clearly promoted.
  - The provision of a national database of sources of funding and creating.
  - Designing and implementing a quality standard for advisory staff across local partners.
  - There may be a national role in terms of gathering and disseminating case studies of good practice, supporting the brokerage of national peer to peer support, and organising national workshops and conferences.

- The roles that can best be carried out at a **local level** are:
    - Ensuring, through effective partnership action, the promotion of clear 'ways in' for community groups seeking support to gain funding.
    - The management of a local (and perhaps inter area) brokerage service and the administration of expenses to support this.
- 8.12 It has ***proved hard to separate out support for the funding of projects from support to develop ideas for funding***, and this may in practice be an artificial distinction for communities as the two are so intertwined (e.g. the development of a business plan is also, in many cases, part of the application for funding and needs to respond to funder interest and requirements).
- 8.13 Finally, while we heard some voices challenging the existence of a separate service for rural communities (compared with urban group). Most of those we discussed this issue with felt that there was a need for a dedicated service for rural communities to avoid the risk of a service being dominated by demand from urban groups.

## 9 OPTIONS AND APPRAISAL

- 9.1 Based on our conclusions, we have identified a number of options for the way forward, with the objective of ensuring that community groups in rural and coastal areas have a clear, accessible and professional source of advice and information on the funding of community projects.
- 9.2 There are a number of ways in which our conclusions could be converted into practice at the national level:
- End Rural Direct without replacement, accepting that this will reduce accessibility of funding to some groups and may mean that TSIs/local partnerships find it difficult to respond to the displaced demand.
  - Maintain a national source of advice and information that is able to complement and support the role of TSIs/local partnerships as the local source of support. In other words, while it should remain accessible to community members, its main purpose would be to support the work of advisers.
  - Create a funded 'demand led' approach by developing a very accessible micro grant fund for capacity building (e.g. grants up to £2,000 to help idea development, bid development or bring in people with expertise and experience). Most groups are aware of, apply for, and received BIG A4A grants. A similar pot designed for capacity building with very light touch application and eligibility requirements could allow groups to get the support they need directly themselves. Care should be taken about how to brand and administer this as awareness is the key. This could be operated through local partnerships, BIG or a continued Rural Direct (even though it has low awareness among potential beneficiaries).
  - Provide funding to funders to allow them to offer more holistic funding advice including more effective referrals to alternate funders. For example, this could be about:
    - Reducing the lack of incentive financial funders have to take time to make informed referrals to an alternate, better suited funder
    - Providing funding officer time to support idea development
    - Providing funding officer time to advise on matters such as governance arrangements before applications are made.
  - Build on existing alternative sources of information and advice on funding by working with other providers (such as open4communities) to provide a nationally available service which meets the needs of rural communities in Scotland.



- Develop and implement a quality assurance programme for advisory staff in local partnerships.
- Continue Rural Direct in a similar form, but place much more emphasis on signposting to local provision (e.g. Third Sector Interfaces/LA/LEADER) or specialist provision and awareness. It could also flexibly seek to offer services where there was a temporary gap in the market (e.g. around peer to peer support or a specialist topic such as community share offers).

9.3 The options we have identified are, at the local level:

- Ensuring, through effective partnership action, clear ways into information and advice on project funding for rural communities.
- Provide funding for existing local providers (i.e. Third Sector Interfaces/LEADER/LAs) to enhance their capacity to provide local support to groups.
- Support the creation of brokerage capacity in TSIs/local partnerships to help experienced communities support less experienced communities and encourage peer to peer work through the payment of expenses for inter-community travel and associated costs. This could be complemented by a small national support service to broker wider relationships – together with expenses support to enable peer to peer community support.

Over the next two pages (Figures 31 and 32) we appraise these options against five criteria:

- Consistency with our findings
- Meeting the expressed needs of communities
- Building on what already exists
- Consistency with policy
- Cost effectiveness.

The colour code for these two Figures is as follows:

Red – weak score against criteria

Yellow – medium score against criteria

Green – scores strongly against criteria

Figure 31: National service options

<i>Option</i>	Consistent with our findings	Meeting the expressed needs of communities	Builds on what already exists	Consistent with policy	Cost effective	Overall
<i>End Rural Direct and its funding</i>	Red	Yellow	Red	Red	Yellow	Yellow
<i>Maintain national source of information</i>	Green	Green	Green	Green	Green	Green
<i>Create a demand led approach through funding for support</i>	Green	Red	Yellow	Green	Yellow	Yellow
<i>Funding to funders</i>	Red	Red	Green	Yellow	Red	Yellow
<i>Build on existing sources of information</i>	Red	Yellow	Green	Green	Yellow	Yellow
<i>Quality assurance of advisory staff</i>	Green	Green	Green	Green	Green	Green
<i>Continue Rural Direct</i>	Yellow	Yellow	Yellow	Green	Yellow	Yellow

**Figure 32: Local service options**

<i>Option</i>	<b>Consistent with our findings</b>	<b>Meeting the expressed needs of communities</b>	<b>Builds on what already exists</b>	<b>Consistent with policy</b>	<b>Cost effective</b>	<b>Overall</b>
<i><b>Develop a local partnership approach to the promotion and provision of advice and information in each LA area</b></i>	Green	Green	Green	Green	Green	Green
<i><b>Promote TSIs as ‘first port of call’</b></i>	Green	Yellow	Yellow	Green	Yellow	Yellow
<i><b>Fund TSIs and partners to enhance capacity</b></i>	Green	Green	Green	Green	Green	Green
<i><b>Create and support brokerage capacity in local partnerships</b></i>	Green	Green	Green	Green	Green	Green

In assessing these local options it is important to recognise:

- The creation of a clear and agreed local ‘first port of call’ will require close partnership working between TSIs, Local Authorities, and other local partners.
- The development of a brokerage service to support peer to peer working will also need a partnership approach, as it is a feature of some of the latest LEADER Local Development Strategies, and will be a focus for the new Village SOS programme in Scotland.

## 10 RECOMMENDATIONS

- 10.1 Our most important recommendation is that, in terms of providing advice and information on funding, there are roles that are best carried out at the national scale and others that are best carried out locally. ***We recommend that these national and local components should form an integrated approach which ensures that the information and advice offered is accessible, accurate and of a consistently high quality.***
- 10.2 Firstly, we make recommendations for those aspects of information and advice on funding that are best carried **at the national level**. This should focus on supporting front line staff who are providing advice locally and by ensuring easy local access. There should be a number of aspects to this:
- In principle, the Third Sector Interfaces are the most obvious ‘first port of call’ for locally accessible funding advice because of their specific role and remit. However, in practice, these are at different stages of development and have varied local profiles. In addition, Local Authorities and LEADER have an established role to play as a ‘way into’ information and advice and many communities have well established and valued working relationships with them. ***We therefore recommend*** that the Scottish Government should encourage and support the development of a strong partnership approach to the promotion of advice and information on funding in each Local Authority area which takes into account local profile and resources.
  - There is an important role to be played at the national level in improving and ensuring the quality of local advice provision through these local partnerships. ***We recommend*** that a national quality standard for advisory staff should be developed and implemented by the Scottish Government.
  - There should be a single, national, high quality source of information on available sources of funding for advisors and rural community groups. ***We therefore recommend*** that steps should be taken to ensure that the SCVO Funding Scotland resource is suitably usable and sufficiently well-maintained for rural community groups. In addition, we recommend that there should be a regular assessment of the provision that other online resources (such as open4community sites) play in particular areas in Scotland and they should be promoted to local advisors where appropriate.
  - A key source of support should involve promoting learning by sharing good practice amongst local advice providers, both in terms of funding advice and in terms of community group success stories – e.g. how and why community groups were able to achieve funding through access to high quality funding advice. ***We recommend*** that this should be spread through existing networks.

- Working with funders (e.g. public funders) to understand the scope that exists for improving the way that their systems of application and claims processes are managed, with a view to better ensuring that the complexity of funding requirements are truly proportionate to the scale of funding requested and are not stifling the entrepreneurship of rural community groups seeking to improve their communities.

### 10.3 We recommend that **at the local level**:

- Third Sector Interfaces should work with Local Authorities and other locally established sources of information and advice to develop locally coherent approaches to the promotion and provision of advice and information on rural funding. This approach should be clearly disseminated, particularly to those communities and groups who may not have been reached by previous efforts, and to groups who face local needs but lack experience in taking forward and funding local projects.
- The form of provision should involve quick tips and advice / signposting and specialist advice, and also the provision of intensive support for those groups who need it, especially community groups who are at an “early stage” of development. This service could be delivered in person, with telephone support a suitable alternative (as per community groups’ expressed desires).
- The local partnerships will need to ensure a consistently high quality of adviser support and should work closely with national support to implement, maintain and build on a national standard for staff providing advice. In each Local Authority area this should involve all those staff who provide information and advice to rural groups.
- The service should develop a strong focus on peer mentoring from other community group members who have “been there and done it”. This will be required to provide the local capacity to provide intensive one to one support for those that need it. Support from such individuals was often cited as being valuable by community groups, and there was support for the idea of peer mentoring at advice provider workshops. For peer mentoring to work, there needs to be a well-designed brokerage and support process to allow this to happen. This will need to include an effective matching process – or needs/situation with experience/expertise, advice on how to provide effective peer support, and an effective system of provision of expenses for mentors.

## APPENDIX 1: THIRD SECTOR INTERFACES

Third Sector Interfaces	Local Partners
Aberdeen Council of Voluntary Organisations	
Aberdeenshire Voluntary Action	Bridge CVS CVS Aberdeenshire – Central and South Volunteer Centre Aberdeenshire
Voluntary Action Angus	
Argyll and Bute Third Sector Partnership	Argyll and Bute Social Enterprise Network Argyll Voluntary Action Islay and Jura CVS
Clackmannanshire Third Sector Interface	
Dumfries and Galloway Third Sector Interface	
Dundee Third Sector Interface	Dundee Voluntary Action Ltd Dundee Social Enterprise Network Volunteer Centre Dundee
Voluntary Action East Ayrshire	Volunteer Centre CVO East Ayrshire
East Dunbartonshire Voluntary Action	
Volunteer Development East Lothian	
Voluntary Action East Renfrewshire	
Edinburgh Third Sector Interface	Edinburgh Voluntary Organisations' Council Edinburgh Social Enterprise Network Volunteer Centre Edinburgh
CVS Falkirk and District	
Fife Voluntary Action	
Glasgow's Third Sector Interface	Glasgow Council for the Voluntary Sector GSEN/ CEiS Volunteer Glasgow Glasgow Third Sector Forum
Highland Third Sector Partnership	Caithness Voluntary Groups Signpost Inc Voluntary Groups East Sutherland CVS North Ross-Shire Voluntary Action Voluntary Action Badenoch and Strathspey Voluntary Action Lochaber Skye and Lochalsh CVO
Inverclyde's Third Sector interface	CVS Inverclyde Inverclyde Community Development Trust

<b>Third Sector Interfaces</b>	<b>Local Partners</b>
Third Sector Midlothian	Volunteer Centre Midlothian Midlothian Voluntary Action Social Enterprise Alliance Midlothian
tsiMORAY	
North Ayrshire Third Sector Interface	The Ayrshire Community Trust Arran Community and Voluntary Services
Voluntary Action North Lanarkshire	
Orkney Voluntary Action Orkney	
Voluntary Action Perthshire	
Engage Renfrewshire	
Borders Third Sector Partnership	The Bridge Volunteer Centre Berwickshire Association for Voluntary Services Scottish Borders Social Enterprise Chamber
Voluntary Action Shetland	
Voluntary Action South Ayrshire	
Voluntary Action South Lanarkshire	
Stirlingshire Voluntary Enterprise	
West Dunbartonshire CVS	
Co-Cheangal Innse Gall	Voluntary Action Borders and Vatersay Harris Voluntary Service Volunteering Hebrides Volunteer Centre Western Isles Outer Hebrides Social Economy Partnership
Voluntary Sector Gateway West Lothian	

## **APPENDIX 2: PROVIDERS OF SUPPORT TO COMMUNITY GROUPS IN SCOTLAND**

We identified over 270 organisations during our mapping exercise. In this Appendix we have presented them as National Organisations or Local Organisations.

### **National Organisations (78)**

Assist Social Capital  
Big Lottery Fund  
Business Gateway  
CADISPA  
CAP  
CARES  
CEiS  
CEMVO Scotland  
Church of Scotland  
Community Broadband Scotland  
Community Development Alliance Scotland  
Community Energy Scotland  
Community Enterprise  
Community Ownership Support Service (COSS)  
Community Resources Network Scotland  
Community Retailing Network  
Community Shares Scotland  
Economic Development Association Scotland (EDAS)  
Evaluation Support Scotland  
EVOG  
Federation of City Farms and Community Gardens  
Firstport  
Forestry Commission Scotland  
Foundation Scotland  
Grantfinder  
Hugh Fraser Foundation  
Institute of Fundraising (some pages of site are accessible freely)  
Interface – The knowledge connection for business  
J4B BidTrack (online funding search)  
J4B Grants Database  
Just Enterprise  
Keep Scotland Beautiful  
Local Action on Food  
Museums Galleries Scotland  
Office of the Scottish Charity Commission  
Open4community  
Paths for All  
Planning Aid for Scotland  
Plunkett Foundation  
Princes Trust Youth Business Scotland  
Ready for Business  
Resourcing Scotland's Heritage



Rural Direct  
School for Social Entrepreneurs Scotland  
Scotland Europa  
Scotland Funders Forum  
Scotland's Town Partnership  
Scottish Allotment Gardens Society  
Scottish Community Development Centre  
Scottish Community Land Network  
Scottish Council for Voluntary Organisations  
Scottish Crofting Federation  
Scottish Enterprise  
Scottish Funders Forum  
Scottish Government Rural Payments and Inspections Directorate (SGRPID)  
Scottish Islands Federation  
Scottish Land Fund  
Scottish National Rural Network  
Scottish Natural Heritage  
Scottish Orchards  
SENSCOT  
SKS Scotland  
Social Audit Network  
Social Enterprise Academy  
Social Enterprise Chamber  
Social Enterprise Scotland  
Social Firms Scotland  
Social Impact Scotland  
Social Investment Scotland  
Social Return on Investment Network  
STEP  
SURF  
The Crofting Commission  
The Scotland Food and Drink Skills Academy  
TRELLIS  
Triathlon Scotland  
VAS - Voluntary Action Scotland  
Voluntary Arts Scotland

### **Local organisations**

Aberdeen Council of Voluntary Organisations (ACVO)  
Aberdeenshire Council  
Aberdeenshire Rural Partnerships  
Aberdeenshire Voluntary Action  
Ailsa Horizons  
Alloa Town Centre BID  
Angus Council (External Funding Team)  
Arbroath Guildry  
Argyll and Bute Council  
Argyll and The Islands LEADER  
Argyll and Bute Third Sector Partnership c/o Argyll Voluntary Action

Argyll and the Isles Coast and Countryside trust  
Arran Community and Voluntary Service  
Assist Social Capital  
Ayrshire LEADER  
Ayrshire Rivers Trust  
Ballater Royal Deeside Ltd.  
Banffshire Partnership  
BCCF Environmental  
Berwickshire Association for Voluntary Service (BAVS)  
Big Lottery Fund  
Borders Childcare Partnership  
Borders Community Transport Network  
Borders Disability Forum  
Borders Sport and Leisure Trust  
BRAG Enterprises  
Bridge  
Buchan Development Partnership  
Business Gateway  
Business Gateway and Economic Development team  
Business Gateway Falkirk Council  
CADISPA  
Cairngorms LEADER  
Cairngorms National Park Authority  
Caithness Voluntary Group  
CAP  
CARES  
CEiS  
CEMVO Scotland  
Central Borders Federation of Village Halls  
Central Scotland Green Network  
Church of Scotland  
Clackmannanshire Council  
Clackmannanshire Third Sector Interface  
CnES Funding Portal  
Coalfields Community Federation  
Co-Cheangal Innse Gall  
Comhairle nan Eilean Siar - Community Gateway  
Community Broadband Scotland  
Community Development Alliance Scotland  
Community Energy Scotland  
Community Enterprise  
Community Learning and Development - Falkirk East Team  
Community Organisations core-funded to offer this sort of advice  
Community Ownership Support Service (COSS)  
Community Resources Network Scotland  
Community Retailing Network  
Community Shares Scotland  
Community Woodlands Association  
Creetown Initiative  
CVS Aberdeenshire - Central and South (CVSA - C and S)

CVS Falkirk and District  
CVS Inverclyde  
CVS North  
D and G Arts Unlimited  
Deeside DMO  
Deeside Donside Development Project  
DG4 community  
Dumfries and Galloway LEADER  
Dumfries and Galloway Area Committee  
Dumfries and Galloway Council - External Funding Unit  
Dumfries and Galloway Social Enterprise Network  
Dundee 4 communities  
Dundee Voluntary Action  
Dunfermline Delivers BID  
East Ayrshire Council  
East Ayrshire North Communities Federation  
East Dunbartonshire Council  
East Dunbartonshire Voluntary Action  
East Lothian Council  
East Lothian Voluntary Organisations Network (ELVON)  
East Renfrewshire Council  
East Renfrewshire LEADER  
Economic Development Association Scotland (EDAS)  
Embrace Elgin BID  
Engage Renfrewshire  
Enterprising Bathgate BID  
Evaluation Support Scotland  
EVOG  
Falkirk Council Funding Unit  
Falkirk Delivers BID  
Federation of City Farms and Community Gardens  
Fife Council  
Fife LEADER  
Fife Rural Partnership  
Fife Voluntary Action  
Firstport  
Forestry Commission Scotland  
Formartine Partnership Ltd  
Forth Sector Development  
Forth Valley and Lomond LEADER  
Foundation Scotland  
Funder Finder  
Fusion  
Galloway and Southern Ayrshire Biosphere  
Gannochy Trust -Bell's Whiskey  
Garioch Area Partnership  
Giffnock Village BID and I Love Clarkston BID  
Grant Adviser Info Network (GAIN)  
Grantfinder  
Growbiz

Hamilton BID  
Harris Voluntary Service  
Health Improvement Team - NHS Borders  
Heritage Looters  
HI-Arts  
Highland Council  
Highland Environment Network (HEN)  
Highland LEADER  
Highland Third Sector Partnership  
Highlands and Islands Enterprise Limited  
HISEZ  
Holywood Trust  
Hugh Fraser Foundation  
Inspiralba  
Institute of Fundraising (some pages of site are accessible freely)  
Interface – The knowledge connection for business  
Inverness City Centre BID  
J4B BidTrack (online funding search)  
J4B Grants Database  
Just Enterprise  
Keep Scotland Beautiful  
Kelburn Windfarm Trust  
Kelvin Valley LEADER  
Kincardineshire Development Partnership  
Kirkcaldy4All BID  
Largs Matters BID  
LEADER Innse Gall  
Linlithgow BID  
Living Lerwick BID  
Local Action on Food  
Local Origins Rural Network  
Loch Lomond and The Trossachs National Park Authority  
Loch Ness and Inverness Tourism BID  
Machars Action  
Marr Area Partnership  
Midlothian Council  
Midlothian Third Sector Interface  
Midlothian Voluntary Action  
Milngavie My Way BID  
Moray Council - Economic Development  
Moray LEADER  
Mull and Iona Community Trust  
Museums Galleries Scotland  
North Ayrshire Council External Funding Team  
North Lanarkshire Council  
Office of the Scottish Charity Commission  
Open4community  
Orkney Islands Council  
Orkney Islands LEADER and Kirkwall BID  
PA23 BID - Dunoon and Cowal

Paths for All  
Peeblesshire Federation of Village and Community Halls  
Perth and Kinross Council  
PKC grants direct  
Planning Aid for Scotland  
Plunkett Foundation  
Princes Trust Youth Business Scotland  
Queensferry Ambition BID  
Ready for Business  
Renfrewshire Council  
Renfrewshire LEADER  
Resourcing Scotland's Heritage  
Ross-shire Voluntary Action  
Roxburgh Federation of Village and Community Halls  
Rural Aberdeenshire LEADER  
Rural Community Enterprise and Innovation (SCVO ERDF-funded project)  
Rural Development Trust (Lanark)  
Rural Direct  
Rural Tayside LEADER  
School for Social Entrepreneurs Scotland  
Scotland Europa  
Scotland Funders Forum  
Scotland's Town Partnership  
Scottish Allotment Gardens Society  
Scottish Borders Council  
Scottish Borders Elder Voice  
Scottish Borders Environment Partnership  
Scottish Borders Housing Network  
Scottish Borders LEADER  
Scottish Borders Social Enterprise Chamber  
Scottish Borders U3A  
Scottish Community Development Centre  
Scottish Community Land Network  
Scottish Council for Voluntary Organisations  
Scottish Crofting Federation  
Scottish Enterprise  
Scottish Funders Forum  
Scottish Government Rural Payments and Inspections Directorate (SGRPID)  
Scottish Islands Federation  
Scottish Land Fund  
Scottish National Rural Network  
Scottish Natural Heritage  
Scottish Orchards  
SENSCOT  
Shetland Islands Council  
Shetland Islands LEADER  
SKS Scotland  
Skye and Lochalsh Council for Voluntary Organisations  
Social Audit Network  
Social Enterprise Academy

Social Enterprise Chamber  
Social Enterprise East Lothian  
Social Enterprise Scotland  
Social Firms Scotland  
Social Impact Scotland  
Social Investment Scotland  
Social Return on Investment Network  
Social Value Lab  
South Ayrshire Council  
South Lanarkshire Council  
South Lanarkshire LEADER  
Southern Uplands Partnership  
STEP  
Stewartry Council of Voluntary Service  
Stirling Council  
Stirlingshire Voluntary Enterprise  
SURF  
Sutherland Partnership  
SVE  
The Ayrshire Community Trust (TACT)  
The Bridge - Central Borders (Council of Voluntary Service)  
The Bridge - Roxburgh (Council of Voluntary Service)  
The Bridge - Tweeddale (Councils of Voluntary Service)  
The Crofting Commission  
The hub - your community action centre  
The Melting Pot  
The Rural Development Trust  
The Scotland Food and Drink Skills Academy  
The Social Learning Company  
Third Sector Dumfries and Galloway  
Third Sector First - Dumfries and Galloway  
Third Sector Hebrides  
TRELLIS  
Triathlon Scotland  
tsiMORAY - the Third Sector Interface for Moray  
Tweed Forum  
Tyne Esk LEADER  
VANL - Voluntary Action North Lanarkshire  
VAS - Voluntary Action Scotland  
Voluntary Action Angus  
Voluntary Action Badenoch and Strathspey  
Voluntary Action Barra and Vatersay  
Voluntary Action East Ayrshire c/o CVO East Ayrshire  
Voluntary Action East Renfrewshire  
Voluntary Action Lochaber  
Voluntary Action North Lanarkshire  
Voluntary Action Orkney  
Voluntary Action Perthshire  
Voluntary Action Shetland  
Voluntary Action South Ayrshire (VASA)

Voluntary Action South Lanarkshire  
Voluntary Arts Scotland  
Voluntary Groups East Sutherland  
Voluntary Sector Gateway  
Voluntary Sector Gateway West Lothian  
Volunteer Centre Aberdeenshire  
Volunteer Centre Borders  
Volunteer Centre East Lothian  
Volunteer Centre Midlothian  
West Dunbartonshire Council  
West Dunbartonshire CVS  
West Lothian Council - Community Regeneration  
West Lothian LEADER  
Youth Borders

#### **How to access background or source data**

The data collected for this social research publication:

- are available in more detail through Scottish Neighbourhood Statistics
- are available via an alternative route
- may be made available on request, subject to consideration of legal and ethical factors. Please contact <email address> for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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