TENDER: Portal and digital build for Collaborative Action for Recovery
April 2022

Project overview

London Funders is seeking to commission the design, implementation and support of an online application, grant management process, funder portal and dashboards for a systemic long term collaborative funding programme. This will cover the whole cycle of the funding from application right through to monitoring and impact.

The key areas to be developed are:

1. Web based application form through a bespoke website.
2. Funders only portal, working as a grant management system - displaying eligible applications which gives funders the ability to interact with applications e.g. logging information, commenting, reviewing, funding, rejecting.
3. Dashboards, data and reports generated from applications and those funded.
4. Monitoring and impact being logged by grantees against funded applications through a web based monitoring form.

Opportunity

We are looking for a complete re-design of the digital elements that support funder collaboration, that will link up the various stages of the grant cycle from the applications coming in, funders searching through applications and committing funds, right through to the monitoring and impact once the grants have been spent. We also need to build in adaptability for future programmes to run on this platform separately or alongside each other. The focus needs to be on the user journey for both applicant and funder, and having each stage of the process flow together. Through this project we want to lead the way in best practice, building on learning from the sector, and demonstrate an example that others can benefit from.

Background

About us... London Funders is the only cross-sector membership network for funders and investors in London's civil society. We're uniquely placed to enable funders from all sectors to be effective. We're focused on collaboration – convening funders to connect, contribute and cooperate together, to help people across London's communities to live better lives.

What we're building on... From March 2020 London Funders coordinated 67 funders to come together to collaborate in their response to covid-19 through the London Community Response (LCR). Through that collaboration, over £57.7m was given out in grants - a ground-breaking funder collaboration - with investment moving from crisis response to building towards the recovery and renewal of civil society. Over the last year we've conducted several independent learning reviews to prepare us for future collaborations.

Where we're going… All this learning has shown us that it's clear that collaboration at pace and scale is possible. The challenges London faces – from systemic inequalities to the climate crisis – require the same innovative and bold action displayed by funders during the pandemic.

Going forward we have explored how our shared learning from crisis can be applied to funder collaboration for longer-term/recovery, we've been able to use the feedback and insights from our members and civil society to inform workshops with a cross-section of our members and our equity partners, which has led to the development of proposals for [collaborative action for recovery](#).

We are now working to develop a new set of collaborative funding programmes and want to ensure a tech partner is involved from the outset so the design meets the needs of all involved. Our aim is to launch the first stage in the summer of 2022, with parts of the tech being ready to roll out then.

Funders' Portal

Responding to the Grenfell Tower fire in 2017, London Funders commissioned a funder-only portal to get grants out quickly, with one route in for applicants. This portal allowed funders to log in and view applications for funding that came through one single application form. The portal 'traffic' put through £5m worth of grants, and it acted as a back-up to face to face meetings.

At the start of the pandemic in March 2020 we re-started this portal to enable funders to get crisis grants to London's communities affected by the pandemic – and this time we needed to operate entirely digitally. With a single application form on our website, the applications were checked for eligibility and then uploaded to the portal where funders could log in, view and review applications and then commit funding to individual organisations. The portal was a success with over £57.7m going out to London's communities, following the system being used to process over 10,000 applications, culminating in over 3,400 grants being distributed, with over 100 staff from across participating funders using the portal.

Based on this experience we want to learn from these lessons and redesign the process to streamline the administration and to provide additional functionality for funders (such as bulk commenting or downloading the data of specific sets), and for funders to be able to upload the data to their own grant management systems. By doing this we also intend to remove the potential for human error by automating more elements of each stage of the process.

Project build and process

Whilst we are still designing what the programme(s) will look like, you'll need to work alongside us to develop the digital aspects.

Through the LCR we collected feedback from applicants who used the online application form and from funders who used the portal which we have incorporated into this tender. We published the learning on the processes that support collaboration [here](#).

As well as drawing on this previous learning, you will need to build in time to co-design and test with both applicants and funders to ensure that the final products meet their needs as much as possible. Alongside recruiting digital partners for this part of the project we will also be working with Learning

and Equity Partners[1] from the outset. You will need to work with them to ensure a holistic approach is taken across the wider collaborative project.

The work with our Equity Partners will ensure the human rights approach can be taken through the digital aspects and user journeys of grantees are a key focus. The work with our Learning Partners will help them to capture and synthesise shared understanding of progress we are making, the practice that we are testing, and will feed learning back into the further development of priorities and process.

Through this build and process we think that the key challenges will be:

- Linking the different stages of the system into one well flowing system.
- Making the application as easy as possible for potential grantees.
- Making the system flexible for future changes/rounds of funding with different application forms and needs from funders.
- Creating opensource data that we can then produce and share in dashboards.
- Enabling funders to be able to download data in different formats and to then upload to their own systems (our funder partners do not all use the same Grant Management Systems).

Project details

Below we have outlined the main areas of development and the main requirements that we have already identified to be fulfilled, we may identify more as we develop this process. These will need to be turned into user stories and acceptance criteria with the partner selected.

Application form
- Single web based application form for potential grantees to apply through - linked to open source data e.g. charitybase
- Ensuring that all 11 #FixTheForm issues are solved
- Accessible for disabled people and useable on different devices and in different formats
- Two step process i.e. 'eligibility quiz' to get through to main form

Eligibility checks
- Check for applications that may be duplications, fraudulent or otherwise not eligible to move onto the portal and reject those that aren't through the system, (with space to record further action taken)
- Open source to 360 Giving so funders can see who applicants have previously been funded by
- Allows us to take a human rights approach for applicants that may not outwardly meet criteria and put through onto the portal

Applications on portal
- All eligible applications to move onto the portal

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[1] Equity Partners are infrastructure organisations who represent and work with communities affected by discrimination and structural inequalities

- Search ability by various options from the application form/funders e.g. borough, amount asked for, type of organisation, themes of work
- Applications downloadable in different formats e.g. pdf of the application, .csv of multiple applications
- Editable e.g. uploading supporting documents, correcting mistakes in the application form

Portal interface
- Internal dashboard to show incoming applications / amount funded / categories of applications e.g. by borough or type of organisation.
- Personalised dashboard for funders showing what they have funded, what they are looking at, and more.
- Applicants pages containing key headlines of application, link to application and supporting documents.
- Linking organisations pages i.e. if applying through different programmes you can see their application history and progress.
- Area to upload documents for funders such as FAQs and how to guides

Portal capabilities
- Send out rejections / updates to grantees (via email)
- Funders can commit time sensitive 'bagsy' of applications of interest with a second level for other funders that may want to fund the project and communicate with each other
- 'Bulk' jobs for admin and funders e.g. 'bagsying' applications, leaving comments, committing funding, rejecting applications.
- 'Alerts' sent to users as applications are updated e.g. new comments, uploaded documents.
- Link organisations if applying through various cycles of funding
- Log information against organisation e.g. emails, calls had, documents
- Log funding through one or multiple funders (with no possibility of duplications)
- Edit/ update details of funders and grantees through life cycle of grants i.e. contact details whilst keeping original information for audit trails

Data / Reports
- Downloadable range of reports on applicants / grants given / money per borough (and other topics agreed) for internal use and with partners
- Branded, public-facing interactive, open source dashboard of what has been applied for vs. funded and where, via graphs, heat maps, word clouds and similar tools.
- Different formats of downloads including meeting the 360 data standard
- Reports on monitoring and evaluation

Monitoring and Evaluation
- Single reporting form linked back to organisations page

Timescale & Budget

In your proposal we will need you to submit a budget broken down by key stages of the process:

1. Design & testing
2. Launch & training
3. Ongoing maintenance, support and troubleshooting
4. Future adaptations

We understand this is a large piece of work that will take time to develop fully. We will agree work packages with the selected partner and aim to develop this work in stages and/or through live testing.

Our aim is to open the first programme in late 2022, by which stage we would need as a minimum a working application form, website and portal with time for the other elements (reporting, dashboards, monitoring and evaluation) to be ongoing in its development.

What we are looking for

We want to work with a partner that:

- has the technical expertise to develop and roll-out this platform to aid grantees, funders and London Funders to work collaboratively with ease and to not be 'bogged down' by technical difficulties;
- has an understanding of the not for profit sector, grant management systems and the user journey of grantees;
- can demonstrate a track record of digital design in a collaborative context i.e. working to address the needs of different partners, involving them in design and testing;
- is able to train London Funders staff to undertake the administration of the platform/s; and
- can provide ongoing support to troubleshoot, learn and improve the platform/s as they are used.

How we'll work together if you're successful

As well as drawing on our previous learning, you will need to build in time to co-design and/or test with both applicants and funders to ensure that the final products meet their needs as much as possible. You will also need to work with our Learning and Equity Partners to ensure a holistic approach is taken across the wider collaborative project.

London Funders' Projects, Operations and Data Manager will be responsible for managing the project internally and working with you to ensure we stay on track with key timelines and budgets, and will also ensure you have access to the data and people you need to do your work. The partners and funders across the collaboration will also be involved at key points, potentially through working groups attached to different stages, but we will finalise this when we know how many partners we are working with and how best we can do this.

The process

If you would like to submit a proposal for the work packages in this document you will need to submit this by 12pm on 9 May 2022 to info@londonfunders.org.uk

Your proposal should be sent as a Word or PDF attachment. We would expect you to take no more than two sides of A4 to introduce yourselves to us, highlighting any skills, experience or insights you would bring to the work.

For each of the following stages we would expect no more two sides of A4 to be provided that outlines the approach you would propose taking and giving an outline timescale and budget for your costs in completing this work:

1. Design & testing
2. Launch & training
3. Ongoing maintenance
4. Future adaptations

When looking at your proposal we'll be scoring it on the following criteria:

- Proposed process and ways of co-working with our partners (35%)
- Track record/expertise (35%)
- Timescale - Ability/capacity to deliver design within the timescale and to provide ongoing support (15%)
- Cost – for whole project and each main stage (15%)

If you are selected for consideration, we will be in touch to arrange a meeting before the end of May, where you'll be able to discuss your proposal with us in a bit more depth. We would hope to then be able to confirm appointments by the beginning of June ready for work to commence as soon as possible after appointment.

Any questions?

If anything isn't clear in this brief, then please do get in touch with us – send an email to our Projects, Operations and Data Manager at grace.perry@londonfunders.org.uk.

Thanks for your interest in working with us, we look forward to hearing from you.