Keeping track of essential procedures

For identifying opportunities and keeping up to date

Before you start

Human Resources: Assign the responsibility for monitoring, up-dating and communicating funding opportunities to one suitable member of staff. Delegate at least one more person who can act as a deputy (for holiday cov er etc.).

Agree some basic procedures about monitoring. For example, decide how regularly the funding websites will be monitored and up-dated. Set some rules for up-dating the Funders Map and changing data. Agree a procedure how new funding alerts and developments will be communicated to colleagues and other stakeholders.

Arrange for **sufficient time and resources** so that your funding team staff can attend information and training events about funding opportunities organised by funders or information providers.

Get connect. Sign up to receive newsletters and funding alerts from funders and/or information providers. Ensure that the information is received, read and communicated by relevant staff.

The frequent checking of funders' website and the regular up-dating of the funders map are essential tasks to help identify new funding opportunities and call deadlines on time.

Relevant procedures need to be installed to make sure that these opportunities are checked regularly. This task consists of 2 tools which are both checklists regarding the skills, competences and tasks concerning the position of one/two persons responsible for the regular monitoring of funding opportunities and up-dating of the funders map.

What for?

➢ To facilitate the regular monitoring of the funding environment.

Both tools can be used for the selection process of the person who will be in charge of the monitoring, updating and respective communication activities.

How to use it?

Step 1 Agree to allocate staff time to monitor funding opportunities and calls, and to implement relevant procedures for monitoring the funders map. Ensure that there is acknowledgement of the importance that this task is a dedicated task for one or two team members.

Step 2 **Use Tool 1** to select two or three relevant members of staff for the task of monitoring funding opportunities on a regular basis. Identify their skills set and prov ide training if necessary.

Step 3 **Use Tool 2** to design relevant procedures such as weekly monitoring of information sources and funders' websites. Set up relevant procedures for updating the funders map and for communicating the information of upcoming funding opportunities to relevant colleagues and stakeholders.

Step 4 Review the performance if the staff monitoring the funders map on an annual basis to ensure the established system works as efficient as possible.

Tool 1 – Checklist: Skills and Responsibilities for Scanning of Funding Opportunities	
Skills required	
Excellent internet research skills	
Good analytic and comprehension skills	
Lateral and systemic thinking skills (understanding causalities and interactions)	
High level of interpersonal, networking and communication skills	
Creative thinking skills, i.e. thinking outside the box to discover funding opportunities	
Good IT skills and internet literacy	
Desirable: Good English language skills (for EU applications)	
Experience required	
Knowledge and expertise of domestic organisations and their funding regimes and application processes	
Knowledge and expertise of EU institutions, their funding programmes and processes	
Very good level of understanding of alternative and new approaches to funding and financing projects	
Excellent knowledge of the Action Plan and its projects	
Responsibilities involved in Maintaining a Funders Map	
1. Developing and maintaining high levels of expertise and awareness in online information capture by monitoring upcoming EU and domestic funding opportunities and funding programmes.	
2. Keeping the Funders Map up-to-date and expanding it if and when neccessary with additional funding sources.	
3. Gathering additional intelligence and information on funding opportunities at all level (including regular online searches, reading information, newsletters, funding alerts, but also attendance of network meetings, conferences or workshops)	
4. Linking funding opportunities with the priorities and projects of the Action Plan (requires keeping up to date with the developments of the Action Plan and maintaining frequent contact with relevant project development teams)	
5. Reading and analysing the identified calls and opportunities in detail (Programme guides, call information, eligibility criteria, match-funding requirements, budget limits, etc) and transferring the required information into the Funders Map for future reference.	
6. Disseminating funding calls and information with relevant staff and keeping the municipality well informed about arising funding opportunities (alerting staff to opportunities; providing weekly/monthly update and reporting developments)	
7. Attending and participating in information and training events staged by relevant funding organisations	
8. Providing guidance and briefings on funding sources and calls to municipality / Action Plan and ULG staff and members	

Tool 2 – Checklist: Funders Map Procedures

Monitoring Procedures

1. Appoint one member of staff to monitor key sources of information; check relevant websites of the Funders Map.	
2. Appoint at least one deputy for the task of monitoring the Funders Map in case of illness or holiday absences.	
3. Decide how frequently the information sources and funders' websites will be checked/monitored (weekly/ every second week)	
4. The appointed members of staff need to be given authority to up-date and change the Funders Map in line with new findings.	
5. Ensure that crucial information such as passwords to funders' websites and information sources cannot be changed by other members of staff and that any change of passwords is always noted and changed by the appointed member of staff in charge of the Funders Map.	
6. Incorporate an appraisal procedure of this task to minimise the risk of missing or informing too late about funding opportunities.	

Communication Procedures

7. Provide a clear line of action if and when a funding opportunity has been identified: who will be reported to and how?	
8. Decide how often verbal up-dates will be provided to the Funding Team, the Action Plan team and the ULG members, Action Plan partners and stakeholders about the results of the monitoring of fundingources and new developments.	
9. Ensure that 'Potential Funding Opportunities - Feedback and Gathering of new Intelligence' is a permanent agenda item of Funding team, ULG and Action Plan team meetings.	
10. Ensure that ideas about funding alternatives or new forms of funding that are brought forward by members of staff or other partners are followed up and investigated appropriately.	
11. Design a procedure that ensures that communication about new funding developments is a two way process (between junior and senior staff; between project teams and funding teams).	

Learning Procedures

12. Ensure that staff responsible for monitoring has resources allocated to attend information and training events from relevant funders, including awareness raising events about new sources or ways of funding	
13.Ensure that the weekly/bi-weekly check of sources of information and Funders' websites includes a scan of relevant information and training events.	
14. Provide for a mechanism where new learning from attending information and training events is shared with relevant members of staff, the Action Plan team and the ULG members.	

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