



Reviewing & Adapting

For supporting the regular reviewing and adapting of the funding strategy

Before you start

- **Communicate widely** with stakeholders and get up to date on any strategic and operational developments (such as who is doing what in the local area; are there any new projects, funding programmes, funding approaches coming on stream; etc.)
- **Gathering feedback** from colleagues and partners on the overall effectiveness of the Funding Strategy.

The regular tracking of developments and identification of changes and their impacts on the action plan, its projects and costings is important to identify effectively suitable funding opportunities.

This task assists the reader in preparing for change through regular reviews, supporting an ongoing awareness of developments and keeping an open mindset to accommodate change and adapt accordingly.

It consists of 2 tools:

- 1) An Aide Memoire that helps address change as a standard agenda item of meetings by providing a number of simple procedures
- 2) A template of questions to guide a quarterly review of the funding strategy.

WHAT FOR ?

> To support the regular reviewing and adapting of the funding strategy in order to maintain a high level of coherence in a constantly evolving environment.

> To go further:

- From Action to Impact Game
- Refining an Action Table
- URBACT Opera

HOW TO USE IT ?

Tool 1

Step 1 Ensure that the agenda with all relevant meetings include a standard item asking participants to report any observed changes.

Step 2 Jointly assess if the change will have any impact on your action plan, projects or funding strategy and consider how to address possible consequences. If unable to solve the impact of a change at the meeting, identify a team member who will do the follow-up of the change on all relevant levels of the action plan.

Step 3 Depending on the extent of the adaptation required a number of URBACT tools can be used (see 'useful tools section'). If radical change is needed, relevant decision-makers or senior colleagues should be consulted.

Step 4 Following adaptations, the new version of the strategy/project design should be communicated to all relevant stakeholders.

Tool 2

Step 1 Identify a relevant team to reflect on the effectiveness and performance of the funding strategy. Consult with colleagues that are familiar the work of the Funding Officer/Coordination Team to have external view and get feedback.

Step 2 Facilitate an open discussion/review on the key aspects of coordinating and implementing the funding strategy following the questions of Tool 2.

Step 3 Note the findings of the review and agree on relevant actions.

Step 4 Arrange a date for the next self-assessment meeting.

Tool 1 – Aide Memoire: Ongoing Review of Developments	
Reporting Developments	
1. Ensure that the agenda item ‘Any developments or changes to be reported?’ is included in all relevant meetings (Action Plan team, Funding Coordination Team, ULG, etc.). Ensure that the findings of meetings are communicated effectively.	
2. Ensure that those members of staff responsible for tracking policy changes (Stop 1.3) and for keeping the Funders Map up to date (Stop 1.6) are able to report changes from their observations.	
3. Provide a procedure or mechanism through which changes can be reported outside the timeframe of the meetings. (This could be aligned with the communication processes of monitoring the Funders Map.)	
4. Ensure that staff is alert to changes and that adequate mechanisms are in place for staff to report back from networking and information events they have attended.	
Assessing the Impact of Changes	
5. Assess during the meeting (or when receiving information about changes) if the reported changes are minor or if they need action.	
6. If necessary, identify one member of staff to explore the impacts of the reported change/s further. All aspects of impact on the Funding Strategy, the projects to be funded, their costings, and on the Action Plan in general should be explored.	
7. Set a timeframe when the person in charge of the assessment should be reporting back.	
Adjusting to Changes	
8. If the changes and developments are significant and require adjustment, decide how best to undertake the adjustments. This is done best as a group exercise to capture as many perspectives as possible.	
9. Consider any consequences of the necessary adjustment, for example on the intervention logic of a project, its costings, on the number of staff in the Funding Team, on communication actions with stakeholders, identifying new, alternative funding avenues, etc. etc.	
10. Ensure that all necessary adjustments are undertaken in a given timeframe. Be mindful to check progress on these activities.	
Communicating Adjustments	
11. Ensure that all significant changes and adjustments will be communicated to all relevant players.	

Tool 2: Review of Funding Strategy	
Review Topic	Review Questions
1 - Funding Coordination Team	Regarding the coordination of funding activities, what has worked well / not well over the last review period? Are there any staff changes foreseen which might affect the Funding Coordination Team in future?
2 - Action Plan	What has changed in the design of the Action Plan or any of the projects that would have a direct impact on the Funding Strategy? For example, are there an additional theme, target group, location has been added or removed?
3 - Funding Landscape	What is the current state of intelligence about future funding opportunities, including new funding programmes coming onstream, new calls, new funding avenues and training opportunities? Which of the previous funding opportunities have now been closed and what does this mean for the Action Plan and its projects?
4 - Overall Timing and Sequencing	Have there been or will there be any changes in the timing or prioritisation of the Action Plan and its projects? What are the consequences of these changes?
5 - Funding Requirements	Have there been or will there be any changes regarding the size of projects, for example are there any plans to merge / break down any projects? What are the consequences of these changes?
6 - Funders Map	What has worked well / not well regarding the regular monitoring and updating of the Funders Map? Are there any observations regarding the Funders Map's effectiveness, have new opportunities and calls been identified and communicated adequately, have there been any missed calls? Do the monitoring, updating, and communication of identified opportunities work effectively? How can these processes be improved?
7 - Funding Mix and Option Appraisal	Does the Option Appraisal process work effectively? Has anybody received any feedback with regard to this process? Is there anything which could be improved?
8 - Review and Adjustment of the Funding Strategy	On the basis of the findings of this review meeting, is there a need to adjust the Funding Strategy or any of its processes and procedures? If yes, when and how will this be addressed?
9 - Any other business	Is there anything else to consider with regard to forthcoming funding opportunities, new funding approaches vis-a-vis the Funding Strategy and its processes? What can be improved?
10 - Scheduling of next review meeting	When will be the next Funding Strategy Review Meeting?