

# Co-design, pilot, reboot: creating a new funder reporting system

London Councils grant  
programme



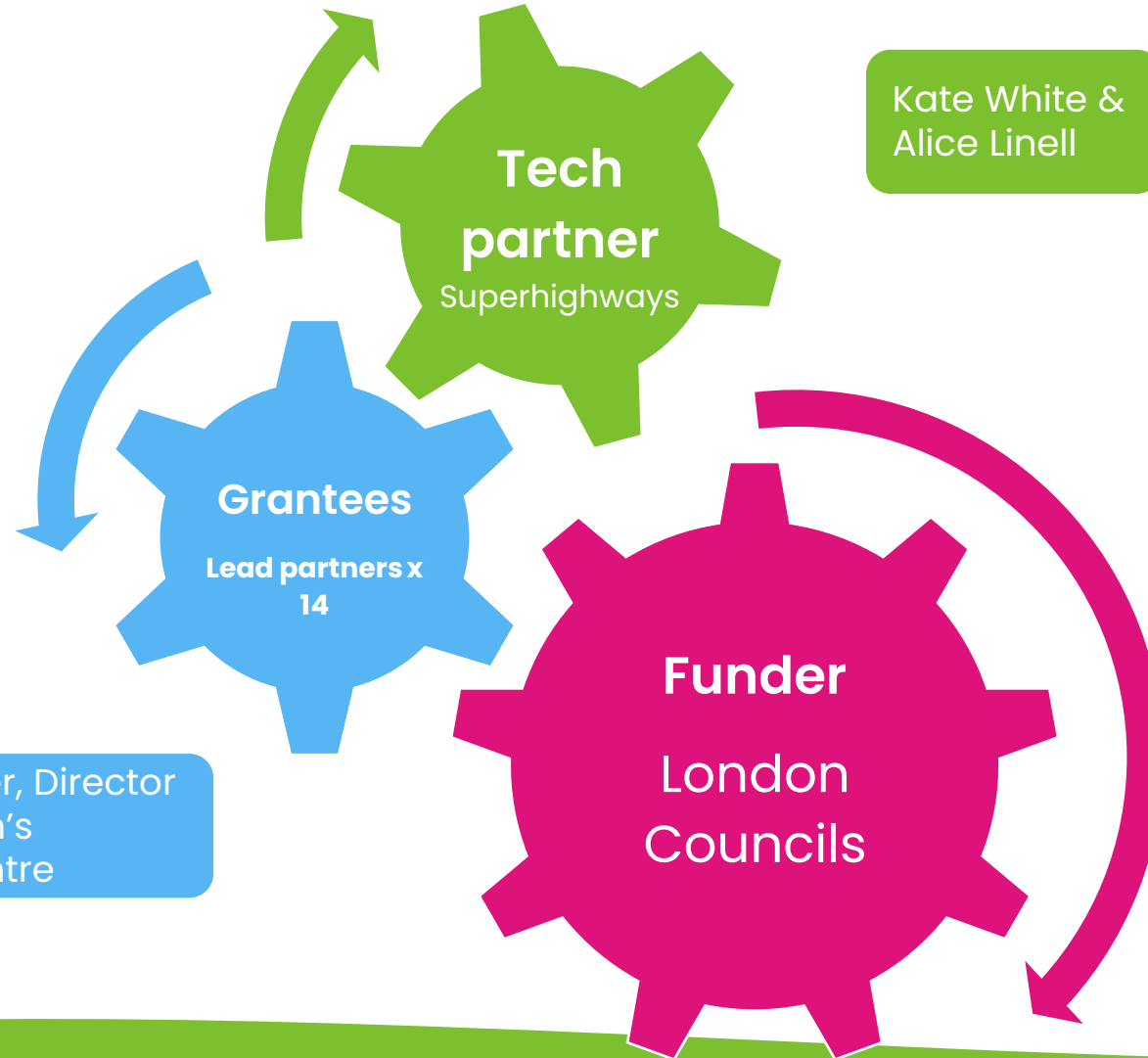
superhighways  
harnessing **technology** for **community** benefit

# From huge spreadsheets to... a low-code no-code portal

- ✓ Our journey together – drivers, challenges, successes & opportunities from a funder, grant manager, grantee and a tech partner's perspective.
- ✓ Learning take aways:
  - ✓ Ideas for a different approach to creating reporting systems
  - ✓ Co-designing systems with multiple stakeholders to realise benefits for all
  - ✓ An agile approach to getting a new system up and running



# Who's joining us today



Kate White &  
Alice Linell

Sarbjit Ganger, Director  
Asian Women's  
Resource Centre

Yolande Burgess, Strategy Director:  
Londons Communities &  
Feria Henry, Grants Manager

# Grant Programme 2022-2026

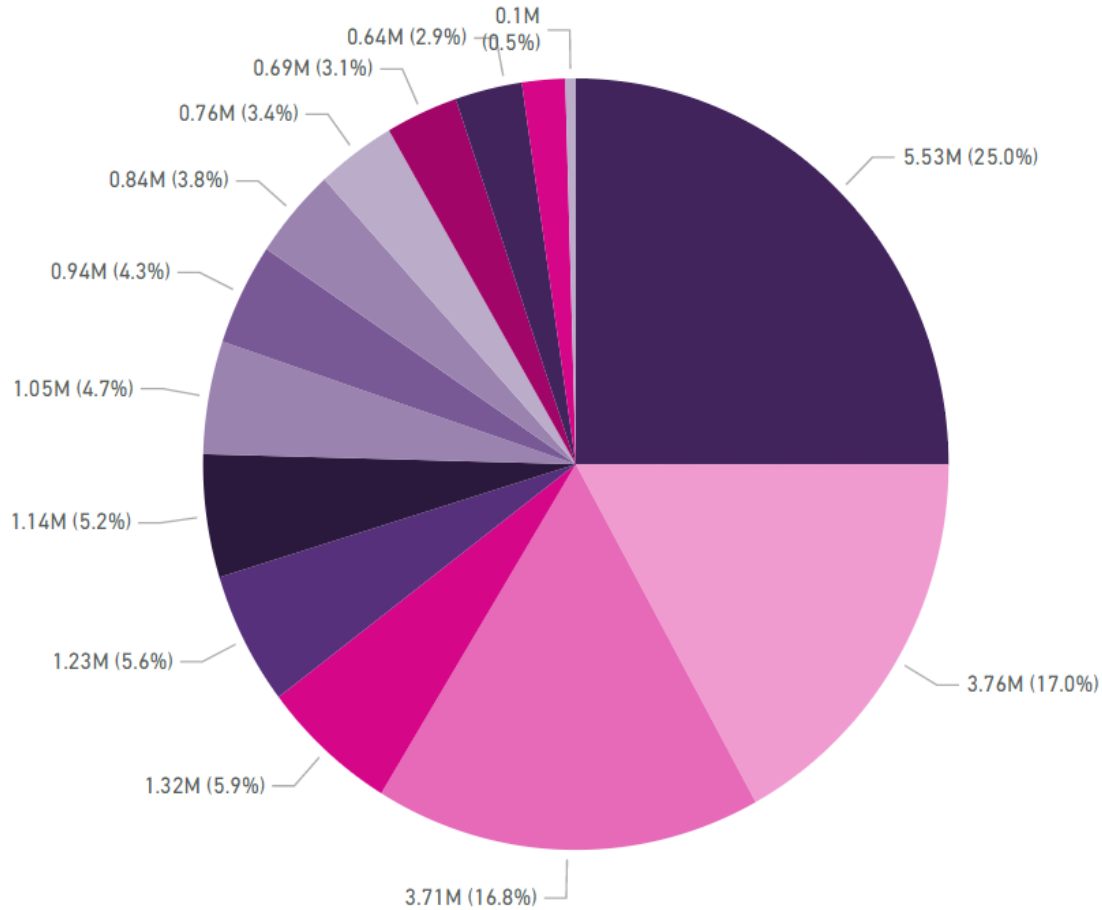


## 22.13M

Total grant amount

### Project name

- Ascent Advice and Counselling Project
- London Youth Gateway (LYG)
- STAR Partnership
- HARP Connect
- Ascent Ending Harmful Practices Part...
- Pan-London domestic and sexual viol...
- SignHealth Deaf Domestic Abuse Ser...
- Healthy London, Healthy Relationship...
- Specialist Refuge Network
- Ascent: Support Services to Organisat...
- London PLUS
- LGBT+ Domestic Abuse Partnership
- StreetLink London Advice Line
- London Refuges Data Collection Proje...



**Priority 1 – Combatting homelessness**

1.1 Prevention and targeted intervention

1.2 Prevention and targeted intervention for rough sleepers

1.3 Prevention and targeted intervention for young people

1.4 Improving the response to homelessness in London

2.1 Prevention (children and young people)

2.2 Specialist advice, counselling and support

2.3 Helpline services

2.4 Emergency refuge accommodation

2.5 Improving the response to domestic and sexual abuse in London

2.6 Services for people affected by harmful practices

**Priority 2 – Tackling domestic and sexual abuse**

# Key challenges of the old system

4 x  
perspectives

Strategic director

Grant Manager

Grantee

Tech partner



# Reporting requirements

Every quarter 14 x

- ✓ Progress reports
- ✓ Financial info, workplans, policies, insurance, AGM minutes etc
- ✓ Project staffing information
- ✓ Case studies



London Councils Grants Scheme 2017-22  
Quarterly progress report – Q16 and Annual Report - Year 4

Monitoring period:	Quarter 16 (1 January to 31 March 2021) and annual report (April 2020 to March 2021)
Deadline for report:	<b>By 5pm 30 April 2021</b>
Name of organisation:	
Project title:	
GIFTS reference:	
Priority/ Service Area:	Priority 2: Tackling Sexual and Domestic Violence
Primary contact:	

This form contains an additional section to your usual quarterly monitoring form to allow you to look back over the first three years of your commission.

Please complete this form and email it to your priority manager at London Councils by the deadline above together with:

- A case study using the template provided (not mandatory)
- The completed database for this quarter (quarterly outcomes, borough spread, equalities, completed budget tab). This also includes list of beneficiary organisations (second tier only)

Also:

- Annual General Meeting (AGM) minutes (if most recent minutes not already sent)
- Copy of employer's and public liability insurance (if valid certificate not already sent)

Budget:

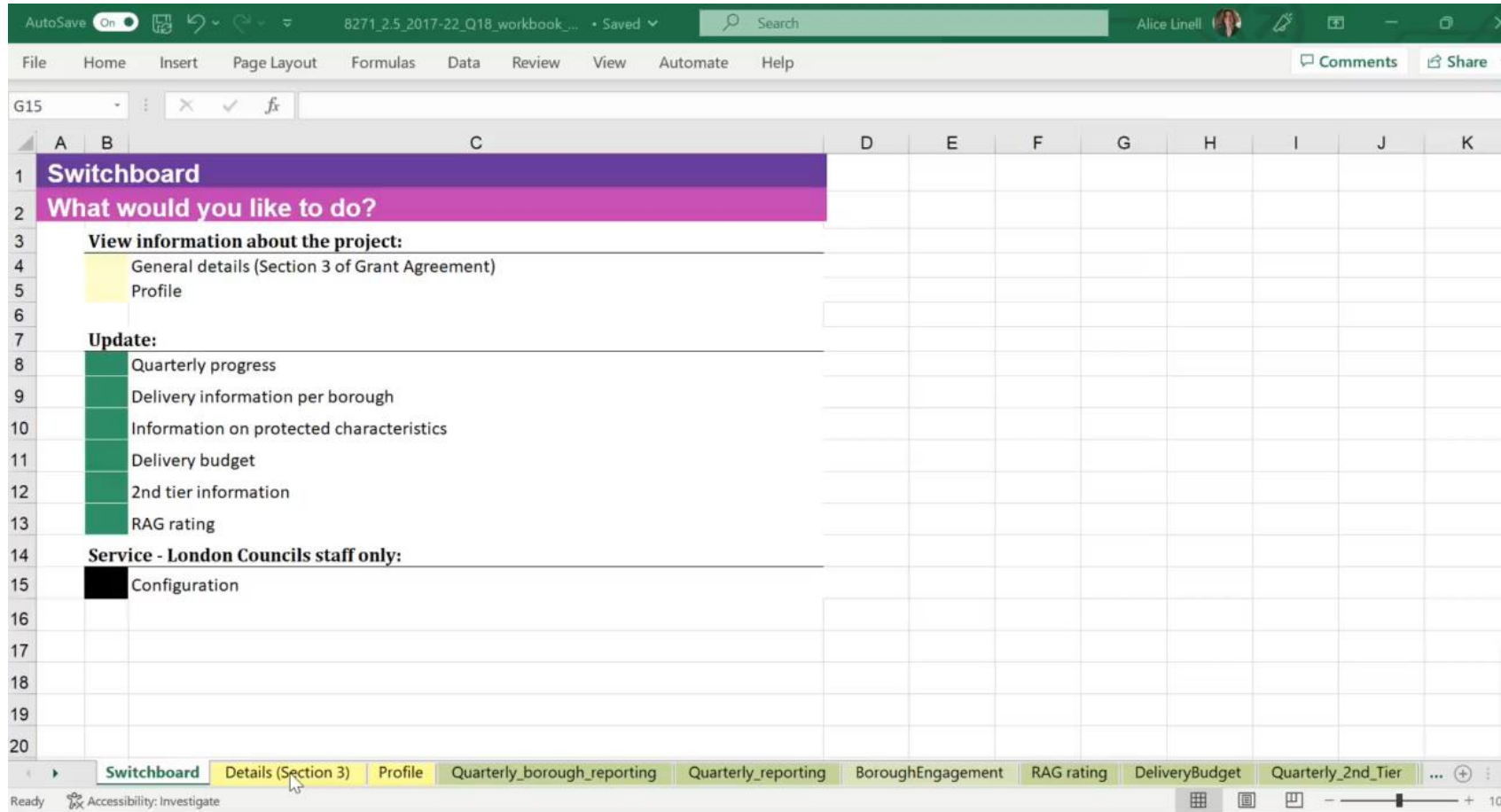
- Complete the budget tab detailing actual expenditure in the year against each budget line, including details of any underspend.

If necessary, your priority manager will return the report to you with any issues/ questions in the [comments](#) boxes below.

If your project is delivered by a partnership, the lead partner should complete the monitoring form, collating information provided by individual delivery partners.



# And a giant Excel spreadsheet!



**“It feels like our data  
goes into a black hole”**





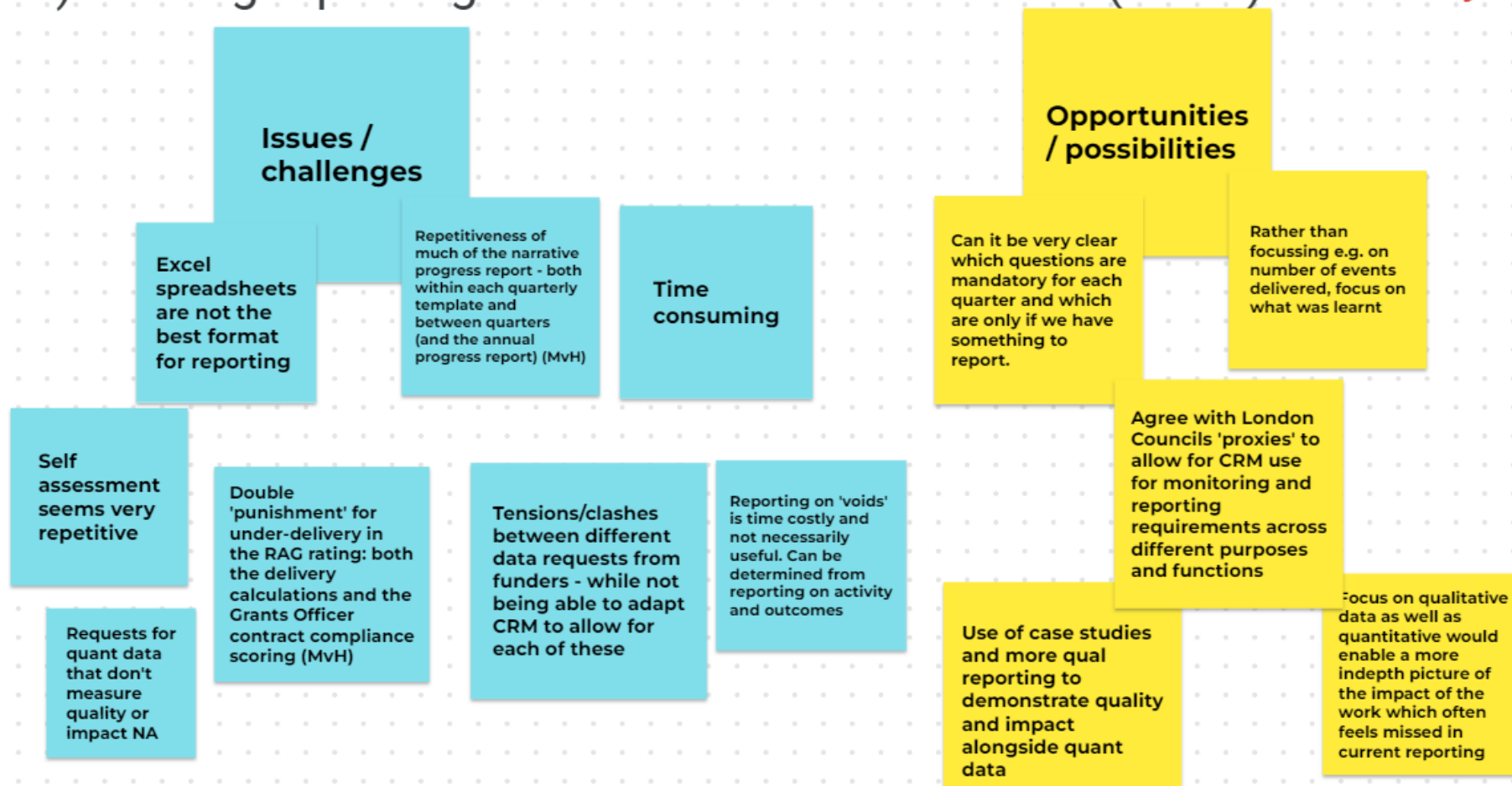
# Co-design

- ✓ Series of workshops & one-to-one interviews capturing everyone's voices
  - ✓ Grant Managers
  - ✓ The wider Grants team
  - ✓ Lead partner grantees
- ✓ To identify the challenges & outline our objectives



# Capturing feedback

## 4) Sharing reporting data with London Councils (leads) Priority 1



# Agreed goals

- ✓ Reduce the amount of time grantees are spending on their reporting to London Councils
- ✓ Reduce the amount of time Grant Managers are spending on collating information & producing reports
- ✓ Share the collated reporting with grantees, the committee & the public in appealing, accessible & interactive formats



# Agreed outcomes

- ✓ Eliminate repetition – if you've already been asked for something once you won't be asked for it again
- ✓ Eliminate duplication – you'll only need to report on something in one place
- ✓ Eliminate disassociation – numbers and narrative will sit together
- ✓ Automate the collection, synthesis and sharing of quarterly reporting



# The options

3 potential routes forward identified:

- ✓ Retain & redevelop Excel & use PowerBI for data analysis & sharing
- ✓ Purchase and customise a third-party specialist application
- ✓ Develop a low-code no-code web based database with an online portal for both grantees and grant managers

# Why pick 'low-code no-code'?



It offers a simple, more accessible way for nontechnical users to build applications without requiring extensive coding.

## Pros

- ✓ No dependency on one computer programmer as anyone can pick up and use it
- ✓ Large support team and an active user community
- ✓ Built in automation tools make it easy to link up with other applications e.g. Mailchimp or Eventbrite
- ✓ Quick to build, adapt and change
- ✓ Cost (tools & time)

## Cons

- ✓ Some limitations in development possibilities as you're using standardised building blocks



# The agreed approach

- ✓ Ensure grantees & grant managers are involved at every step of the journey
- ✓ Hand hold the team and grantees through the process with friendly and responsive training and support
- ✓ Introduce an agile approach to system design, dividing into phases rather than one big launch and ensuring constant improvement and development



April 2022

# London Councils 2022-26 Grant programme Software development cycle

May 2026

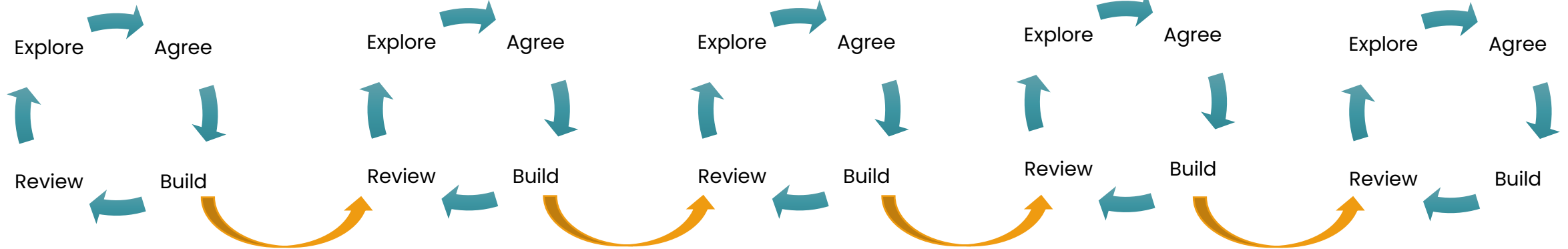
**Phase 1**  
Start of  
programme  
Mar-Apr 2022

**Phase 2**  
Quarterly  
reporting  
Apr-Jul 2022

**Phase 3**  
Annual  
reporting  
Apr-Jul 2023

**Phase 4**  
External  
sharing  
Apr-Jul 2023

**Phase 5**  
End of  
programme  
Apr-Jul 2026



Continuous improvement



# Phase 1

Here's what we built...

London Councils Grant programme

Grant Team Dashboard Grant Projects ▾ Lead Partners ▾ Contact people ▾ Programme management ▾ Meetings Manager Reporting ▾ Help

Print Logged in as Alice Linell - Account Settings - Log Out

### 2022-2026 Projects

search by keyword  search

Export Add filters **Priority 1 - Combatting homelessness** 50 per page ▾

ID	Project name	Service Area	Service Area Description	Project Lead	Org Lead	Priority Manager	Lead Partner	Partnership?	Partners	Project Staff	Project summary	Target groups	Referrals
<b>Priority 1 - Combatting homelessness</b>													
3	HARP Connect	1.1	Prevention and targeted intervention			Maxine Quintyne-Kolaru	<a href="#">St Mungo Community Housing Association</a>	No		Project staff	HARP Connect supports prison leavers at all stages of their journey through... <a href="#">view more</a>	People serving sentences of 1 year or less, licence recalls or those held o... <a href="#">view more</a>	All referrals must be made through a sec Please contact our HARP at harpconnect  Website: <a href="https://www.mungos.org/our-se">https://www.mungos.org/our-se</a> services/
1	STAR Partnership	1.1	Prevention and targeted intervention			Maxine Quintyne-Kolaru	<a href="#">Shelter. The National Campaign For Homeless</a>	Yes	<a href="#">Praxis Stonewall Housing Thames Reach</a>	Project staff	Shelter is leading the specialist STAR (Supporting Tenancies, Accommodation... <a href="#">view more</a>	People with multiple and complex needs; people with mental health	<a href="https://england.shelter.org.uk/get_help/">https://england.shelter.org.uk/get_help/</a>  STAR Video: <a href="https://www.youtube.com/watch?v=mT4Z9yKnM&amp;list=PLrybnVaUKJhDptYtIckblf">https://www.youtube.com/watch?v=mT4Z9yKnM&amp;list=PLrybnVaUKJhDptYtIckblf</a>



# Circling back after Phase 1

Further workshops and one-to-one interviews

## What didn't work so well?

it was a challenge to understand the functions of the portal complete monitoring data and work to a deadline

**Difficult to find information**

Some sections took longer than they needed to because we had to do them one by one rather than a "next button" or in one place

Quite a bit of duplication of work within the entire process - including collecting and collating partner data

**Not enough time to complete everything**

restricted access to completing some of the sections - while understood in terms of only 1 person being able to authorise sign off, it means that the project lead ends up spending a lot of time completing the report despite having others

**Not always clear what is data is mandatory**

Completed our monitoring data submitted but had not completed all the questions

The borough activity log is slow to complete- as need to click into each borough which takes a long time

Still had to rely on the old templates for gathering partner data. Increased project manager workload

Could CSV ability be enabled or be able to open all boroughs at one to add info in each section?

**It took ages to upload all the data manually!**

Wasn't able to import CSV sheet for sections it would be useful for (eg, Section 7). Alice helped but ability for us to do would be great



# Capturing ideas with user needs statements

What new feature would you like?

Why would it be useful?

How would it work?



Add a request

## Functionality requests

Below is a list of all pending additional or amended functionality suggested by the portal users.

search by keyword

ID	Created on	Section	Suggested requirement	Why it would be useful	How would it work?	Proposed by	Approved?	Superhighways feedback	Approved by	Done	Edit
168	25/04/2023	Quarterly reporting	Change reopen for edit to Re-opened for project responses	to make sure it's clear which status the GM should choose	Change the wording on the status		Yes		Feria Henry	No	<input type="button" value="edit"/>

## Completed functionality requests

search by keyword

Showing 1-10 of 31

Page 1 of 4

ID	Suggested requirement	Created on	Why it would be useful	How would it work?	Proposed by	Approved?	Approved by	Done	Implemented by	Implemented on	How it is implemented
1	Allow staff details to be hidden	30/03/2022	Where organisations want to log their staff but don't want the information published for example when they are not yet in post.	A tick box for all user accounts " Hide contact details in Programme directory" Yes = the person's details are only visible to other people in the... <a href="#">view more</a>		Yes	Joanne Watson	Yes	Alice Linell	01/04/2022	A tick box for all user accounts " Hide contact details in Portal" Yes = the person's details are only visible to other people in their own organi... <a href="#">view more</a>

# One of the stumbling blocks...

The sheer amount of information meant that:

- ✓ There was confusion around what was stored where
- ✓ Some sections were not being completed
- ✓ The learning curve felt pretty steep for everyone



# What we did in response

- ✓ Delivered lots of additional training sessions both in groups and one-to-one
- ✓ Built in additional features

London Councils Grant programme

Partner Dashboard My Organisation ▾ Projects ▾ Contacts ▾ Partner Reporting ▾ Partner Programme management ▾ Help Action Log

Help > Outcomes help Logged in as Test Person - Account Settings - Log Out

Click on a topic or enter a keyword below to search for help

Help main menu Project Management Outcomes Delivery Activities

search by keyword search

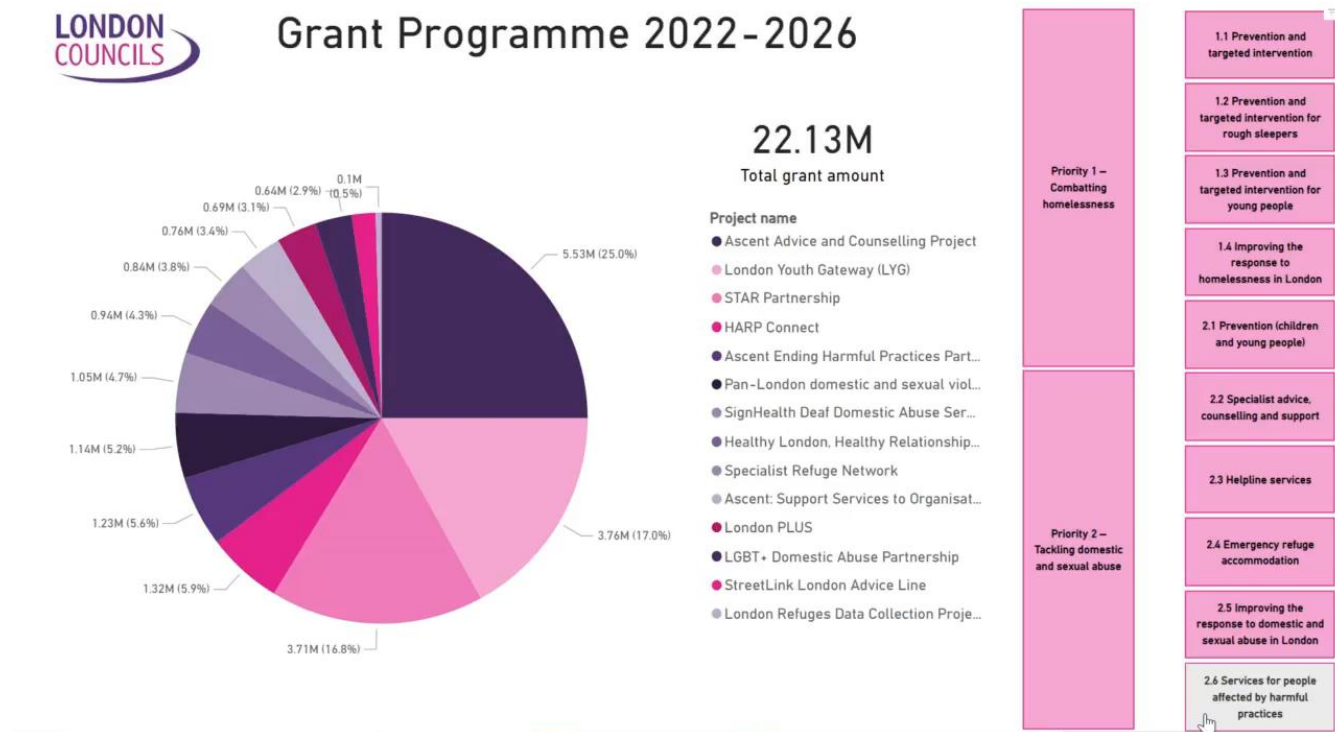
Add filters

ID	Topic	How to complete this section	How this data is used	Who this data shared with	Where can you see this data being used	Example: Priority 1	Example: Priority 2	Example: Tier 2
1	Outcome Evidence	Evidence of activities and outcomes are required for monitoring and audit purposes, so we encourage you to keep the evidence journey simple, consider where evidence occurs naturally and what evidence demonstrates change.	This is Operational data used to enable the London Councils Grant team to validate that Outcomes are being met.	London Councils Grant team		Notes on case management system; case outcome recorded at case closures; documents or records of agreement from accommodation provider or family member/friend (verbal and written); receipts; address/location	Outcome recorded on distance travelled tool used (e.g. CORE, Outcome Star); feedback/evaluation forms, tracking/follow-up phone calls result documentation, monitoring forms	Evaluation forms for relevant training or events, service user satisfaction surveys, benchmarking questionnaires, sample interviews with front-line workers and managers



# Where we are today

Jumping forward in time, we're now at Stage 4 – taking the information we've collected and presenting it back via an interactive reporting tool for external reporting and sharing.



# Quotes from lead partners



I have enjoyed using the portal. It has made it easier to access information such as borough contacts. Having all the reporting in one place that is easily viewable also makes it a lot easier to monitor progress across the year.



A key benefit of using the portal for reporting, has been that all information and data for each quarter is easily accessible and it helps to report in a consistent manner.



It was useful to have a single format, rather than separate the numerical from the narrative. It really helped keep track of what we were saying to LC across quarters & was easier to see the extent of improvement over the year.





The portal is a huge difference and much easier for us to complete, rather than Excel and word document, everything is in one place.



We are strongly in favour of using the expertise and insights funded partners can provide to further policy projects.



It was a great move by London Councils to have an online monitoring tool which centralised all monitoring reports.

# One key win & what you're excited about for the future?

4 x  
perspectives

Grantee

Grant Manager

Strategic Director

Tech partner



# Any questions?



# One key lesson learnt / tip for others

3 x  
perspectives

Grant Manager

Grantee

Strategic Director



# Thank you for coming

If you think of anything after this session you'd like to ask us or if we can provide any assistance please do get in touch

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[Katewhite@superhighways.org.uk](mailto:Katewhite@superhighways.org.uk)

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