360 Giving Manchester Pilot Project Plan

22 February 2017

Overview

Greater Manchester is the first city region to devolve, giving more control in the way that money is spent and resources allocated within the region. The environment in which this is happening is one where the 10 local authorities and the public sector at large, as well as voluntary sector and community organisations are under fiscal stress. These factors combine to make the adoption of a standardised way of representing data across disparate grant giving organisations all the more important. The publication of this data as open data and the development and utilisation of data tools will enable stakeholders, whether it be beneficiaries, grant makers or policy makers, to understand funding flows within Greater Manchester.

Given the number of grantmakers operating in the city and the close cooperation amongst the different local authorities, Manchester makes an ideal location for piloting the use of 360Giving data. We would like to work with funders operating in Greater Manchester to test whether the data meets their needs, and to identify what further information is required to support them with their decision making and learning.

Aims and objectives

1. Embed the use of the 360Giving Standard as the way of publishing grant funding data.
2. Identify ways to make the creation and release of grants data sustainable for funders operating in Greater Manchester.
3. Enable people to understand how standardised funding data will be of use to different organisations.
4. Identify and promote best practice regarding the release of grants data for funders operating in the Greater Manchester area.

Activities

1. Identification of channels to disseminate information regarding the pilot
2. Identify data users and data providers and develop activity around them
3. Develop the business case and logic for the adoption of the 360Giving Standard within identified organisations
4. Create/identify support structures and champions within and externally to organisations
5. Raise awareness of the 360Giving tools that are already available, e.g. CoVE, GrantNav and Beehive
6. Help organisations publish data to the 360Giving Standard, including bespoke sessions and one to one training
7. Help organisations use data published to the 360Giving Standard
8. Develop and deliver a programme of tailored workshops for identified data use/supply communities

9. Develop the use case for a tool or process that can be used by local data use/supply communities and scope it out with project partners, including options and costs for developing and maintaining it

Programme of work

Work packages and deliverables
Activity has been broken down into the following work packages

WP	Description	Activity time period
WP1	Project management and reporting	13.2.17 - 28.7.17
WP2	Partner and organisation acquisition	20.2.17 - 13.4.17
WP3	Tool design	20.3.17 - 7.7.17
WP4	Support	18.4.17 - 30.6.17
WP5	Dissemination	6.3.17 - 28.7.17

Tasks by work package

Work package 1. - Project management and reporting
This work package oversees the day to day running of the pilot, reporting back to the CEO and coordination of partner organisations.

Task	Description	Activity time period
1.1	Day to day project management	13.2.17 - 28.7.17
1.2	Develop project plan	13.2.17 - 24.2.17
1.3	Weekly reporting of project status to CEO	24.2.17 - 28.7.17

Work package 2. - Partner and organisations acquisition
Identification of potential users and suppliers of data (clients), relationship management and timely communication

Task	Description	Activity time period
2.1	Identification of potential data users and suppliers	20.2.17 - 17.3.17
2.2	Client relationship management	20.2.17 - 30.7.17

Work package 3. - Tool design

Development of the use case for a tool or process that can be used by local data use/supply communities and scope it out with project partners, including options and costs for developing and maintaining it.

Task	Description	Activity time period
3.1	Create a design process for specifying tool/process	20.3.17 - 13.4.17
3.2	Scoping of tool/process specification	18.4.17 - 12.5.17
3.3	Creation of tool/process specification	15.5.17 - 7.7.17
3.4	Feedback specification to potential users	19.6.17 - 30.6.17

Work package 4. - Support

Development of a programme of support to enable potential client organisations to understand, use and publish to 360Giving.

Task	Description	Activity time period
4.1	Identification of support structures within and external to client organisations	20.2.17 - 24.3.17
4.2	Development of workshop materials	20.3.17 - 13.4.17
4.3	Event production and management	13.3.17 - 12.5.17
4.4	Develop and arrange bespoke support activity	15.5.17 - 30.6.17

Work package 5. - Dissemination

Publicise and promote the work being undertaken with the Manchester Pilot, 360Giving and the end uses/users of the standard.

Task	Description	Activity time period
5.1	Identification of channels to disseminate information	20.2.17 - 17.3.17
5.2	Raise awareness of the 360Giving tools that are already available, e.g. CoVE, GrantNav and Beehive	13.3.17 - 16.6.17
5.3	Creation of project information and materials	27.2.17 - 17.3.17
5.4	Engage with external related events	9.3.17 - 21.7.17
5.5	Publicise workshops	13.3.17 - 13.4.17

Deliverables

No.	Description	Due date
1	Project plan with agreed milestones and dates for deliverables	24.2.17
2	Public kick off meeting	6.3.17
3	List of key organisations and people within them who would be users/suppliers of data	17.3.17
4	Creation of support material that promotes project and benefits	17.3.17
5	Series of meetings with individuals and organisations	24.3.17
6	Delivery of 3 workshops (minimum) promoting and explaining the use of 360Giving	12.5.17
7	Clearly scoped and costed user-centric tool/process including delivery recommendations	7.7.17
8	Creation of 10 blog posts/articles for 360Giving but also targeted at other channels	21.7.17
9	End of project report	21.7.17
10	Optional end of project workshop	28.7.17

Deliverables by work package

WP	Description	Deliverable
WP1	Project management and reporting	1, 9
WP2	Partner and organisation acquisition	3, 4, 5
WP3	Tool design	7
WP4	Support	6
WP5	Dissemination	2, 8, 10

Milestones

Task	Description	Date
M1	Completion of project plan	24.2.17
M2	Kick off event	6.3.17
M3	Identification of potential users and data suppliers	17.3.17
M4	Face to face meetings completed	24.3.17
M5	Workshops completed	12.5.17
M6	Support activities finish	30.6.17
M6	Specification work completes	7.7.17
M7	Final report submitted	21.7.17

Gantt Chart
https://docs.google.com/spreadsheets/d/1Y6psOa9ySVa12Dt6RHLaQn9Co_D-L2ju1ZoSz4Bh7Zs/edit?usp=sharing - below

Week beginning

ID	Activity	13/2	20/2	27/2	6/3	13/3	20/3	27/3	3/4	10/4	17/4	25/4	1/5	8/5	15/5	22/5	29/5	5/6	12/6	19/6	26/6	3/7	10/7	17/7	24/7
-	Payment dates	▓																							▓
T1.1	Day to day project management	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓
T1.2	Develop project plan	▓	▓																						
T1.3	Weekly reporting of project status to CEO		▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓
D2	Public kick off meeting				▓																				
T2.1	Identification of potential data users and suppliers		▓	▓		▓																			
T2.2	Client relationship management		▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓
-	Client meetings			▓		▓	▓																		
T3.1	Create a design process for specifying tool/process					▓	▓	▓																	
T3.2	Scoping of tool/process specification										▓	▓	▓												
T3.3	Creation of tool/process specification														▓	▓	▓	▓	▓	▓	▓	▓	▓		
T3.4	Feedback specification to potential users																								
D6	Delivery of workshops										▓	▓	▓	▓					▓	▓					
T4.1	Identification of support structures within and external to client organisations		▓	▓	▓	▓	▓																		
T4.2	Development of workshop materials						▓	▓	▓	▓															
T4.3	Event production and management					▓	▓	▓	▓	▓	▓	▓	▓	▓											
T4.4	Develop and arrange bespoke support activity														▓	▓				▓	▓				
D8	Blog posts and article writing			▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	
T5.1	Identification of channels to disseminate information		▓	▓	▓	▓																			
T5.2	Raise awareness of the 360Giving tools that are already available, e.g. CoVE, GrantNav and Beehive									▓	▓	▓	▓	▓	▓	▓	▓	▓	▓						
T5.3	Creation of project information and materials			▓	▓	▓																			
T5.4	Engage with external related events				▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓
T5.5	Publicise workshops					▓	▓	▓	▓	▓															

Target sectors

It is intended to contact a broad range of organisations some of which are already aware of 360Giving. From talking to these sectors workshops and content will be created with relevant focus.

- Voluntary sector organisations
    - Central coordinating organisations
    - CiviCRM users
    - Local CVSs
- Local charitable trusts
- Housing associations
    - Data working groups
    - Community of practice groups
- Local authorities - departmental
    - Voluntary sector procurement
    - Children families and social care
    - Culture funding
    - Other grant functions
- Strategic organisations/departments
    - Mapping and analytics functions
    - Policy
    - Mayor's office
- Health and social care
    - PCTs
    - Clinical Commissioning Groups
    - Health Action Zones

Risk log

Risk No	Description	Impact	Likelihood	Mitigation
1	Organisations don't engage with the pilot	High	Medium	1. Target publicity appropriately 2. Personal contact with potential organisations 3. Identify mitigating measures with CEO 4. Engage high level political advocacy
2	Organisations don't adopt and publish data to the 360Giving Standard	High	Medium	1. Devise alternative strategy for adoption 2. Develop a staged approach to adoption 3. Increase awareness

					of the benefits
3	Pilot diverges from originally agreed objectives	High	Low		1. Weekly catch up calls with CEO 2. Agreed project plan with deliverables, but acknowledges need to be opportunistic
4	Adverse publicity affects the delivery of the pilot	High	Low		1. Agree communications strategy for pilot 2. Liaise with CEO
5	Pilot runs out of operational funds	Medium	Low		1. Agreed budget for activity 2. Use of appropriate 'in kind' facilities 3. Pre-agreed areas of expenditure

Budget

Fees for the delivery of Manchester pilot   £15,000.00
Budget for delivery expenses of pilot   £2,000.00

TOTAL   £17,000.00

Payment dates

Date	Description	Amount
13.2.17	Commissioning payment (Completion of M1)	5,000.00
12.5.17	Mid-term project payment (Completion of M5)	5,000.00
28.7.17	Final payment (Completion of M7)	5,000.00
	TOTAL	15,000.00

Other project expenditure will be paid on submission of expenses claim with relevant receipts.