UK Grantmaking Platform

ITT for the development of UK Grantmaking research platform

360Giving is seeking to commission an agency to develop a new visual identity and web platform to present data and insights on grantmaking spend in the UK. The budget for this work is anticipated to be £25k inclusive of VAT.

Background

About 360Giving

Our vision is for grantmaking in the UK to become more informed, effective and strategic. Our aim is for more money to go to where it is needed most to support communities and good causes through a more informed understanding of the grantmaking picture.

We support funders to publish open data using the 360Giving Data Standard. This enables them to share information on who, where and what they fund in a way that others e.g other grantmakers or fundraisers can access and use for free.

We also help people to access and use the data, and have created tools to make it easy to explore, download and visualise. Because the data is standardised, it can be looked at and analysed all together, helping us to see and understand grantmaking across the UK.

Our values

Our values underpin all of our work. We are purposeful; open; curious, collaborative and inclusive.

Description of the project

In developing the 2022-25 strategy, 360Giving stakeholders and users highlighted a need for an overview and understanding of the broader context of grantmaking in the UK.

The vision is for an overview of grantmaking in the UK across all sectors, dimensions of grants made in published data, and relevant trends. It will use data from 360Giving as well as external data sources such as Charity Commission data. The output will be a high-profile dynamic platform that provides users with the latest data and trends about UK grantmaking, commentary and insights, and enables them to view and download the data and information.
they require. Each year, the platform will be updated with the latest data available. In 2024, this will be for the financial year 2022-23.

The work will partner with, and build upon existing overviews of grantmaking and be a collaborative project across a range of sector organisations.

It will provide an opportunity for 360Giving to support the sector’s collection and use of grantmaking data through the signposting of existing tools and services, and most importantly, promote the work of our partners and funders who share their data, which enables us to deliver our mission.

The platform will have a clear visual identity that will engage senior stakeholders in the grantmaking sector to publish and make use of data. The data prepared for this interactive publication will also be used as a base for other analysis and deep dives, and for a benchmarking product.

**History**

While we will be launching the UK Grantmaking research for the first time in June 2024, we have published a Snapshot report in June 2023 which was hosted on 360Giving’s website at [https://www.threesixtygiving.org/snapshot/](https://www.threesixtygiving.org/snapshot/)

The purpose of this work was to pilot an approach to producing the data and to have an illustration to be able to have more tangible discussions with potential partners, funders and sponsors and to guide the development of the platform we seek to commission. We did not include trend information, case studies or more significant commentary, but will do so in the UK Grantmaking platform and research.

**Purpose/objectives**

Our mission is to help UK funders publish their grants data in an open, standardised way, and support people to understand and use this data to improve charitable giving. There are several important reasons for developing the UK Grantmaking platform. First, the platform will establish a single source of grantmaking data that will support:

- Partners to demonstrate the collective impact of their members;
- 360Giving data publishers to see the value and importance of their work through seeing the insights their data provides;
- Funder leadership decision-making and collaboration e.g. enabling grantmakers to easily identify similar organisations and compare financial practices;
- Policymakers and advocacy work to understand trends and where interventions may be required;
• sector bodies, academics, researchers and policymakers intending to better understand grantmaking and implications, and to inform grantmaking and charity practices and campaigns;
• fundraisers in developing income generation strategies; and
• sector media to increase awareness and understanding of UK grantmaking.

The data and insights gathered on the platform will promote conversation and engagement about UK grantmaking and act as a catalyst for encouraging more grantmakers to publish and improve the quality and timeliness of their data so that the picture of UK grantmaking becomes more complete over time. We will build upon the discussion and feedback we receive and provide/develop our tools, services and resources to meet the data needs of the grantmaking sector and stakeholders.

In developing this project, we will work collaboratively with others to continue to develop a supportive environment for data collection and use across the grantmaking sector.

Sustainability of the platform is critical – it will present the latest grantmaking data that will be updated yearly and will need to be adaptable for new data and grantmaking developments - and new chapters/partners, as the project develops over time.

**Summary outcomes for UK Grantmaking platform users**

1. Clear central hub for enabling easier access and understanding of the current position and trends of grantmaking organisations to provide context to support decision-making. We expect around 2-3,000 users in the course of a year [Note: there will be no login to access the data so this will be based on analytics]
2. Insights provided from the platform will be useful and inform organisational and sector practice, strategy, research and policy decision-making. This will be measured through survey responses (both qualitatively and quantitatively) developed after the publication of the platform.

**Scope**

**Platform**

This project is for the development of a new visual identity and platform to allow 360Giving and partners to house UK Grantmaking data and insights. The platform will be purpose-built for accessibility and allow embedding of interactive visualisations and tables, different levels of commentary text, downloadable data and references, reporting of any errors in the data and clear navigation. It must also be set up for good monitoring of which sections users are engaging with for future optimisation.
The platform must be non-proprietary. It must be set-up in a way that 360Giving has ability to update and maintain the platform, including potential expansion of sections in future years, as well as 360Giving having all IP and copyright for the platform.

**User stories**

As a visitor I want to...

- Navigate across the platform so that I can understand UK Grantmaking
- Interact with charts and tables so that I can get at the data that’s most relevant to me
- Understand how this analysis was done and where the data came from so that I can learn how to do something similar myself
- Understand which data is 360Giving data so I can see the impact of publishing quality data
- Send a report to 360Giving if data about my organisation is incorrect
- Understand which commentary explains the findings of the analysis and which is opinion added by partners or special interest stakeholders
- Access the raw data (for example as a spreadsheet) so that I can use it myself, look at specifics in my area of interest or verify the analysis
- Easily access the report/content/data with or without assistive technology so that I can benefit the same as everyone else from its insight
- Learn about other products and services from 360Giving such as benchmarking and GrantNav so that I can get specific insights and embed data use into my work.
- Easily access additional content from partners

As a partner I want...

- To have my logo in my section
- To have a friendly URL to be able to link to my section and particular visuals or tables in my section
- For it to be visually clear what is the commentary on data from 360Giving and my organisation's commentary and case studies
- To have downloadable summaries of my section
- To have analytics on readers of my platform and what actions they took, including specific downloads

As a sponsor I want...

- My brand to be associated with the platform and research so that it gains credibility and awareness
- To be able to understand how many people accessed the platform so that I can understand my ROI or how impactful it was in delivering our strategy.
As a content editor I want …

- It to be easy to edit / add content and visualisations, repeat content structures and make corrections/changes and annual updates
- To be able to preview/test the platform before it launches in a realistic setting
- To have access to detailed analytics to optimise the content in future years

Contents

See the content outline and initial discovery in the Appendix. A more detailed brief will be provided to the appointed supplier.

Visual Identity

360Giving is taking a collaborative approach to the project, aiming to work with 5-7+ partners to support the validation of the data, development of commentary and promotion of the product. 360Giving will be managing partner communications and input.

The platform will be on a new domain, UKGrantmaking.org. We require a new visual identity for UK Grantmaking that will appeal to stakeholders and be inclusive of partners. Whilst the visual identity may look different to other 360Giving tools, 360Giving tools will be signposted across the platform.

The platform will need to include the partners’ names, logos and additional signposting, where relevant. Where partners provide additional commentary to the content being developed for the platform, we will need a clear, visual distinction between analysis and commentary on the data produced for the platform and commentary produced by partners.

At 360Giving, inclusion is one of our core values. We need our identity and our products to be clear and accessible to all users. The application of best practices in accessibility and inclusion is key.

The visual identity work should include the development of:

- Logo
- Brand colours
- Typeface
- Typography
- Icons
- Visual identity guidelines that capture the above

Printed materials are outside the scope of this tender, but the visual identity should also be applicable to off-platform assets.
Out of scope
The platform is not expected to support creating data visualisations within it. Instead, we anticipate creating the visualisations in a specialist platform such as Flourish or Tableau and embedding them within the platform. However, the visual identity must take into account the ease of applying it in templates in the selected visualisation platform(s). For example, choosing fonts available through Google Fonts means they can be used in Flourish.

Budget
The anticipated budget for this work is £25,000 inclusive of VAT.

Proposal criteria
Please provide a proposal (maximum 6 pages) including the following information:

- Information about your company and track record
  - Whether you have worked with other charities
  - Whether you are a living wage employer
  - Any policies around your environmental impact
- Outline the project plan and estimated timeline
  - What are the stages of this project
  - What involvement is needed from 360Giving staff at each stage of the project
  - What time is allocated for testing, both by you and 360Giving
  - What lead time is there before work can begin
  - When you expect to be able to complete the work by
- Proposed platform(s) or libraries
  - Details of any platforms or libraries that are integral to your proposal such as the content management system (CMS) you recommend (our website currently uses Wordpress, but we are open to using another CMS if justified)
  - Whether they have any fixed or ongoing licencing costs
  - Whether they are open-source
  - Approach to accessibility
  - Proposed platform monitoring and analytics
- Monitoring and reporting
  - What you will be monitoring and reporting on to evaluate the success of the project
- Cost
A breakdown of the costs, including any optional elements of the proposal

How to apply

We will assess bids based on the criteria listed in the proposal section above.

Please send your proposal by email to labs@threesixtygiving.org by 4th January 2024 10am.

Shortlisted proposals will be invited to interview on Wednesday 10th January 2024. Please hold this date in your diary.

If you have any questions, please email labs@threesixtygiving.org

We would like to start this work as soon as possible and aiming for completion of the platform set up by end of February 2024 to launch the UK Grantmaking platform in early June 2024.
Appendix

Content outline
Segmentation of grantmakers will be applied broadly similar to the *Snapshot report*, with the addition of an estimate for companies, if we are able to separate from contributions to Corporate Foundations that are already in there.

The sections can be seen as “chapters” on the top menu with segments within these chapters.

Please note, this is just an initial starting point and will be shaped with the partners and advisory group based on what data is realistically available.

0. Home page
   - Purpose, navigation
   - Partners
   - Sponsors

1. Highlights
   - Key points
   - Downloadable summaries

2. The grantmaking picture
   - Which organisations make grants?
   - What is the totality of grantmaking in the UK?
   - Comparing different sectors
   - Regranting from government to foundations and lottery to foundations/
     between foundations
   - How does this compare to other forms of sector income? - context from NCVO

3. Grantmakers
   - Grantmaking per segment
   - Trends per segment
   - Largest Funders in each segment with who is publishing 360Giving data, who
     isn’t
   - Commentary on the nature of the data

4. Foundation Grantmaking analysis
   - Grantmaking trends of largest xxx
   - Endowment/Investment/Asset trends of largest xxx
   - Family Foundation trends of largest xxx
   - Corporate Foundations trends of largest xxx
   - Partner case studies and commentaries
5. **Grants to Individuals**
   - A series of analyses presented as charts, tables, data visualisations and ability for data to be downloaded. This section will also include commentary by partners.

6. **Grants to organisations/recipients**
   - A series of analyses presented as charts, tables, data visualisations and ability for data to be downloaded. This section will also include commentary by 360Giving team

7. **Partner 2 grantmaking analysis and trends**
   - A series of analyses presented as charts, tables, data visualisations and ability for data to be downloaded. This section will also include commentary by partners

8. **Partner 3 grantmaking analysis and trends**
   - A series of analyses presented as charts, tables, data visualisations and ability for data to be downloaded. This section will also include commentary by partners

9. **Partner 4 grantmaking analysis and trends**
   - A series of analyses presented as charts, tables, data visualisations and ability for data to be downloaded. This section will also include commentary by partners

10. **Methodology**

    Full data will be available to download - and individual tables and charts

**Initial discovery**

**What problem is this tool/project trying to solve?**

We need:

- A home for 360Giving’s new annual data analysis project
- Separate visual identity from 360Giving website and other tools to be more neutral and inclusive of partner logos and content – but the brand values, language and tone will be consistent with 360Giving’s
- To make it easier to set up/publish the analysis with a mix of interactive visualisations and copy
- Interactive tables (eg to allow users to filter and sort by different fields, so need a table authoring tool to get the data from Excel
● More visible ways of linking out to e.g. partners, for instance through bigger content tiles

● Ways to distinguish between opinion type commentary - to attribute to partners which is different to 360Giving comments/summaries of the data

● To make it easy to navigate within the content visually

● To make it easy to understand how it came together through contextual help, including:
  ○ A way to mitigate the risk of confusion/upset around data that we can’t share
  ○ A way to flag the source of the data in all cases (e.g. this data comes from the Charity Commission or from 360Giving)

● Effective analytics to see what users are accessing and downloading, outlinks etc

We don’t want a visualisation builder, we will embed these from a third party. Also to note, the visualisations/tables will not be running from live data.

How is this done currently?

● Currently, the Snapshot report is hosted on 360Giving’s own website at https://www.threesixtygiving.org/snapshot/ using Wordpress

● The data is available via links to Google sheets

● The visualisations are made in Flourish

● The tables are HTML-generated tables

What are the pain points/issues with the current way of doing things?

● It was hard to collect analytics about people accessing the report because it was within our own website, but spread across multiple pages.

● We will need separate visual identity from 360Giving that is inclusive of partners and sponsors

● It was hard to configure copy/images/navigation for a non-technical user
  ○ It was fiddly as it used a different template within Wordpress, and the tabs at the top were not very configurable

● Staging site was also used for other things including testing and trialling updates

● We will need to have more commentary in future years

● The tables were not interactive or sortable/filterable

What was good:

● Accessibility

● Visually, we felt it looked nice
Any user research or feedback asking for this to be resolved?

- Feedback from our staff team on difficulty of use of the CMS
- Positive feedback on accessibility from a workshop we demoed it at
- No user research done on the platform itself, but no negative feedback was received

What behaviour do we want to motivate?

Everyone:

- Read the research
- Explore visualisations further
- Find relevant content within the platform (navigate to relevant “chapter”)
- Inspire data use – needs to be visually appealing, and easy to understand what we did
- Access data in our tools (GrantNav, 360Insights, Data Quality Dashboard)
- Use the data to inform decision-making and policy

Grantmakers:

- Publish their data – need calls to action
- Improve their data quality – need to improve their understanding of the impact it has
- Access our other paid-for services e.g. benchmarking