

Fundraising from Trusts & Foundations

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27 November 2013

Objectives for Today

- To explore what makes a good funding application
- To apply that knowledge to our own organisations

Your Fundraising so Far

- What have you applied for up to now?
- Which were successful? Why?
- Who are your targets now? Why?

Funders want:

- Their own strategic objectives met
- A geographical spread (or focus)
- Great case studies to demonstrate their work
- Organisations who are professional, easy to work with, reliable, and who deliver
- Innovative ideas or approaches
- Accurate financial information
- A lack of waffle
- Acknowledgement and thanks

What can we apply for? The pros and cons

- Arts Council
- Local authorities
- UK government departments
- Europe
- Other lottery distributors
- Trusts & Foundations
- Social investments
- Loans
- What else?

Where to Research?

- www.fundinginformation.org – aimed at voluntary sector; not as comprehensive as some
- www.grantfinder.co.uk – more commercial; good for a local authority to subscribe then share with local charities
- www.governmentfunding.org.uk – run by DSC; europe, UK gov, local gov
- www.lotteryfunding.org.uk – run by lottery distributors; good summary of all schemes
- E-bulletins, newsletters, social media, word of mouth etc.

First assess your organisation

- Who are your supporters?
- Who will be fundraising?
- Do you have usable data?
- Are you clear about your project and need?
- Do you have financial information to hand?
- Who will manage on-going relationships?
- Is your board leading, and do they all understand what the strategy is?
- How much time can you commit?

Deciding Whether to Apply

Ask yourself:

- Are we eligible? – Phone if poss.
- Do we meet criteria/priorities?
- What is the funder really looking for?
- Have we included all the costs?
- Can we meet the terms & conditions?
- What happens when the grant ends?

Knowing Your Funder

Get to know them through:

- Reading printed criteria
- A phone call/meeting if possible
- Reading annual report
- Trawling as many past grants as possible
- Exploring every bit of their website

Making a Target List

- Trawl the help websites, other organisations' websites etc.
- Thorough research on each T&F
- Agree resources you have available
- Mix scales of application – large and small trusts or amounts

Getting Your Application in Shape

- Case for support – about us, the difference we make, why we need money
- Hard statistics and emotional stories
- Reflect their specific language and priorities
- Show why you're different/better than the rest
- Partners and endorsements

EXERCISE

Describe your organisation in:

- 20 words
- 50 words

Common Questions for T&Fs

- Describe your organisation
- Describe your project
- What do you want to achieve?
- What impact will you make?
- What need are you addressing?
- How will you measure success?

Tackling the Common Questions

3 to work on in detail:

- What impact will you make?
- What need are you addressing?
- How will you measure success?

Statistics – what to measure

- Participant numbers annually or project by project
- Where people come from – deprived wards? Troubled estates?
- Ethnicity spread, age, gender, disability
- External sources – social issues, economic status etc

Endorsements and Case Studies

- Specific case studies with pictures to illustrate different parts of your work
- Quotes from partners and other funders
- Quotes/thank-you letters from participants
- Positive press coverage

EXERCISE

1. Choose a project you are fundraising for

2. Describe the impact the project would make in 50-100 words

Don't forget outputs (stats), user satisfaction (stories), outcomes (what changed)

Creating a Case for Support

- Who are you targeting? Different target, different argument
- What is special about what you do? What would be lost if you weren't there?
- What benefits do you think your funder would get from what you do?
- Can you deliver a well-managed, long-term project for your funder?

EXERCISE

Create bullet points for your own Case for Support.

Include:

- What is special about you
- What would be lost if you weren't there
- What benefits you bring to communities
- How you would use a grant

Why Applications Fail

- Not eligible
- Don't meet priorities
- Haven't answered questions
- Too close to project start
- Don't stand out
- Missing or incomplete information

Final Do's and Don'ts

- Say exactly what you will use funds for
- Submit before the deadline
- Assume they know nothing about you – no jargon
- Prepare for assessor visits
- Always keep records for evaluation
- Don't be greedy or over-ambitious
- Don't discount small Trusts with little information available

Questions?

Comments?

Next steps?

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