

The information below is an overview of requirements and for further more detailed information, support and guidance etc please contact the BVA Group Development team via telephone 01256 423816 or email admin@bvaction.org.uk (please quote "BVA Group Assistance" on title).

www.bvaction.org.uk

Fundraising is essentially about selling a good idea to someone who has the means to make it happen. If you can interest them in your idea they will want to support you.

Who you approach and how you ask - by letter, by application form, in person, or over the phone will need research and preparation. Unless specifically requested, do not send requests for funding by email, it shows little effort has been made.

Step 1: Prepare to make your case

A good application will:

- Show the importance of the work you do.
- Have facts and figures to support your application.
- Have a well thought out project plan and budget and show the track record of your organisation.
- Show evidence that you can carry out the proposed work, and will be sustainable after the grant has been spent.
- Have supporting information and be presented well.
- Funders do not just look at your ideas; they also look at your organisation and its track record.

Gathering information

The more information you have prepared in advance, the easier it is when it comes to writing your application.

Information about your group or organisation

You will need to provide the following information:

- A statement about what your group does; its main purpose and aims.
- Your legal status.
- The people involved in your group - numbers of paid staff, volunteers and your members.
- Your structure.
- How long have you been going? What work you have done to date. Where are you based and evidence of your management and financial skills and experience.
- A statement about why your work or cause is important; why funders should want to support you; why your group is best placed to do what it does.
- Copies of your last annual report, accounts, and any other relevant material such as information about other funders, press cuttings, photographs, leaflets, survey results, quotes from users.
- Information about the problems and needs you want to address.

You may think the answers to this are obvious, but you have to be able to prove need.

Funders want to know that the problems are real, urgent and solvable, and that their money will make a difference.

You need to provide facts and figures to support your case. Think about your area of work and who you might approach to get statistics to back up your arguments. You may need to conduct your own survey to demonstrate need and lack of provision or to produce a 'community map' showing those features which are valued locally but do not appear on 'official' maps. Think about what facts you need to know about the area you serve to help you make your case.

Where you go for information will depend very much on the type of work you do or want to do. Some potential sources are:

- The National Census
- Some local authorities have produced community plans that include lots of useful information on the groups of people and the areas of most acute poverty within the district or county and council departments usually have evidence about their particular area of service provision (such as Social Services and Housing)
- Health Authorities all do research and have information about health care needs and provision within their area.
- Any national charity or organisation working in your field is likely to have information that you could use.
- Contact the relevant departments of universities and colleges to find out what information they have.
- Ask Jobcentres or Chambers of Commerce and the Learning and Skills Councils for employment information.

Information about your group's credibility and competence

Your reputation and track record will be very important. When deciding whether to make a grant, funders not only need to believe in your 'idea', they also want to know that they are giving money to a competent organisation with the ability to manage that money, people and projects.

Are you well known or:

- Are you a member of, or affiliated to a larger organisation like a national charity who funders may be familiar with?
- What other support do you have?
- Can you show evidence of recent successes and achievements?

- Can you obtain references should this be required? (If you are a member of BVS and we have been involved or made aware of your funding bid we will act as referee for your group.)

Information about your proposed project

Most funders want to fund specific pieces of work rather than general costs (sometimes called 'core costs'). So you need to package your funding needs into discrete projects in order to attract funding.

Information about potential funders

You need to gather information about those funders who are most likely to support your proposal. Once you have identified who to approach you need to find out as much as possible about them - who to contact, their policies, their funding timetables and so on.

For each funder you need to think about:

- What sort of work they normally fund, for instance disability or housing or arts projects;
- Do they fund groups in a particular geographical area?
- What size of grant do they normally make;
- How long will they make grants for?
- Do they favour capital rather than revenue grants;
- Do they fund new, innovative ideas?
- What is their procedure for dealing with applications? Is it by letter or application form? When are their deadlines for receiving, and making decisions on, applications?
- The correct name and address of the funder and the name and title of the person to write to, and can you contact a person to talk to before making your application?

Step 2: Putting together an application

Most larger funders have application forms and these are often online forms sent to one group member via email. However, the most usual way to apply to charitable trusts is still by letter.

Writing a letter

Think about the letter. You need to interest the funder in your project, and then supply all the information they will need in order to make a decision.

What needs to go into a letter?

- Project title and an introduction to your group. What you do; what your goals and objectives are; how long you have been going; how many members you have; why you are special; any significant achievements; what support you have received from other bodies or well known people.
- A summary of the project proposal. Clearly and concisely spell out what you are applying for and how much it will cost.
- Why you want the money. Give specific information about problems you have identified, supported with statistics and evidence. Say who will benefit from you tackling these needs.

- A description of your proposal. What you intend to do to meet the needs you have identified; what method you will use; what your objectives will be. Outline the timescale and your evaluation methods.
- A breakdown of the costs involved - your budget. Show a breakdown of income and expenditure and a copy of your latest accounts. It is important that you ask for a specific amount of money.
- Why should they fund you? Does your proposal fit within their funding policy? It is likely you will have to emphasise different aspects of your work for different funders, for instance some may be interested in you because you are working in a specific geographical area, others because the project falls within their area of interest, such as older people.
- Sign off positively. Offer more information if needed or invite them to come and visit you.

Make sure your letter is:

- Short and to the point. Make sure you give enough information to allow the reader to understand your area of work, what you want to do and why it's worth funding. Keep your letter to two sides of A4.
- Attractively presented. Type your letter on your headed paper. Divide the text into short paragraphs to make it easier to read.
- Free of jargon and abbreviations. Use straightforward, plain language to avoid misunderstandings. Charitable trusts are particularly likely to be put off by local authority jargon and abbreviations.
- Addressed personally to the named correspondent of the funding body. Do not write Dear Sir/Madam. Always find a name and check the spelling.

Back up information

As funders receive hundreds of applications and do not have the time to read lots of information, keeping your letter to two sides of A4 is important, and attaching relevant supporting evidence, such as: your latest annual report and accounts; facts and figures supporting your case; visual material such as photographs; press cuttings; a detailed budget and plan for the project; a list of financial supporters; a fundraising plan if you have one.

An example of a short letter of application is given below. It should give you an idea of how a letter can be written containing all the information you need to give.

Sample Letter

To: Mr R Downley
The Charitable Trust
Smiths Solicitors
10 Old Town Road
Wenslydale

From: Chesham Volunteers
8 Newtown Road
Chesham HP0 3AO
Tel: 01999 830200

1 September 2012

Dear Mr Downley

I am writing on behalf of Chesham Volunteers to ask for support for our work.

The Chesham Volunteers have been operating now for about 10 years. We are run by a voluntary management committee and are a registered charity no. 123456 involving a wide range of local people in practical volunteering projects. We work closely with young people and older people in recruiting volunteers.

We have initiated and supported many local projects, most recently, an intergenerational project putting together the history of the local brushmaking factories in the town. We have received funding in the past from Chiltern District Council for basic equipment and to pay volunteers' expenses, but these are only one-off grants and we now need to look for new funding.

We now need to produce new publicity materials to attract new volunteers who are unemployed and to train them in new skills. I am attaching a breakdown of costs involved. The total amount we need is £750.00.

I hope you will support the work of the Chesham Volunteers and look forward to hearing from you. Please let me know if you need any further information.

Yours sincerely

Julie Jones
Chair, Chesham Volunteers
Enclosed: Costing for Project

Most **online** funding applications will limit you to a maximum number of *characters* for each response; it is very worthwhile considering drafting your responses on a Word document **prior** to attempting the online application, to ensure you have reviewed in advance all the questions required of you, and more importantly you have managed to get all the information you want to say in the correct response section within the maximum number of characters allowed.

In addition, if for example you are given say, 400 characters to answer the question: "Explain how you know that people in your community want this project/activity and what evidence have you collected to demonstrate this" - make sure you use the maximum characters allowed, and not submit just one sentence of say, 50 characters. They clearly think this section is important enough to require a substantial response.

Filling in an application form

Every application form is different. Get a copy of the form and any guidelines, and read it carefully, paying special attention to any information about the criteria the funder uses. Check the deadline for returning the form.

If possible make a copy of the application form before you fill anything in and fill in the copy in rough first. Where it is an online document, see if you can view all the questions and sections that will require completion, print off and make yourself a word document which you can cut and paste into the online form once you are satisfied with your rough copy. It is important not to repeat yourself or put the information in the wrong place, to miss out vital information or to answer the question incorrectly.

You can contact BVS for advice and support as we may already have produced Word documents for the key online funding application forms, which will save you time. A BVS Group Development Worker will also be able to review your draft copies, and provide suggestions and guidance on how to complete and enhance your application.

Remember to:

- **Answer every question on the form. If you can't then explain why not. It is better than leaving a question blank.**
- Don't answer by saying 'see attached' with lots of extra documents - they may very likely not get read.
- The application form is all that will be considered. Don't send a letter when there is an application form, and be careful too about sending a covering letter, which contains information that should be in the form.
- If you get really stuck with a question try and think about why the funder is asking it.
- Take a copy of your completed form before you send it off.
- Keep to the funder's deadlines for returning the form. Late applications will be ignored.

Step 3 - Assessing your application

Have you written a good application? Get someone from outside your group (such as BVS) to read it through and check it is clear and that you haven't missed out any obvious points.

Is the project:

- Specific - an identifiable piece of work or equipment
- Meeting a need - explain how.
- Important - to you, to users, to funders.
- Of benefit - can you identify likely outcomes?
- Realistic - must be achievable.
- Cost effective - must show 'value for money'.
- Topical - reflecting current issues and concerns.
- Relevant - to the funders you approach.
- Bite-sized - neither too large nor too small. A large project could be broken down into sub-projects.

Checklist

The Application:

- Does what you are applying for fit into their funding policies and criteria?
- Is the amount of money you are seeking in line with the size of that funder's income and normal range of grants?
- Is the timing right? What is the funder's deadline and when do you need the money by?
- Is it addressed to the right person? Have you spelt their name correctly?
- Have you got the most recent address and name for the funder and their correspondent?
- Have you got an appropriate title for the project?
- Have you taken out any jargon or abbreviations?
- If it is a letter, is it typed on your letterhead and signed?
- Is it the right length or can you make it shorter? Remember, keep letters to two sides of A4 paper maximum.

Content:

- Does it say clearly who you are and what you do - the nature of your group and how long you have been going?
- Have you included your group's name, address, phone number and status of the contact person?
- Have you described your legal and/or charitable status?
- Have you clearly spelt out your project proposal - what you need the money for and why?

- Have you backed up your request with facts and figures to prove the need you are identifying?
 - Have you shown how you will evaluate the grant?
 - Have you said where else you are trying to raise money from?
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- Have you established that your group has the ability, skills and resources to carry out the work?
 - Have you shown that you have thought about how the proposal will be funded once this particular grant has expired (if appropriate)?

Budget:

- Do your figures add up?
- Have you included all the costs, and are they realistic?
- Have you costed in a contribution to overheads where appropriate?
- Does it represent 'value for money'?

Supporting material:

Have you included accounts, annual reports, leaflets, press cuttings, etc? But not too much!

Records: Have you taken a copy for your file?

Funders Requirements

Funders tend to fund projects rather than organisations.

A project is:

- a specific piece of work
- which lasts for a fixed period of time and
- has its own budget.

Ask the funder to **participate** in this successful project which will benefit the community. Study the funder's aims and objectives and explain how your project **matches** their aims. Sell success, not sympathy – show the funders how their money will benefit the target group, try to quantify this impact in terms of number of people who will benefit, etc. You must view your funding initiative as a **BUSINESS PROPOSAL**, rather than begging for help.

Funders need to know -

- **Who is applying** (Are they experienced in this line of work? Can they deliver this project? Are they accountable to anyone? Is there a risk they'll run off with the money?).
- **What they want to do** (an outline of the project plan).
- **Who will benefit and how.**

- **Why they want to do it** (proof of demand and need).
- **How much it will cost** (backed up by a budget).
- **How all this relates to their** (the funders') **own priorities.**

An organisation should have a number of potential projects for which it is seeking funding. Projects should be researched and costed.

Applications need to be easy to read and concise.

Always read an application form (and the guidelines) before you start writing on it, so you know what all the questions will cover.

Work out your own budget before filling in that part of the form and keep your working notes, in case they ask questions on how you came up with the figures.

If you're unsuccessful, ask for feedback so you can avoid the same mistakes next time.

Generally speaking all projects must meet four criteria:

1) NEED (there is a need for the project)

- **What unmet need will the project satisfy?** - e.g. improving health, reducing teenage pregnancy,
- **Why is the project needed** - objective data, stats, subjective information
- **Who are the beneficiaries** - age group, location, ethnicity, sex, disability
- **Where will the project be based** - local authority, postcode, ward
- **When will the project start and finish** - financial year, calendar year, pilot project, fixed term
- **How will the project be delivered** - outreach, centre based

2) CAPABILITY (you are able to put the project into practice)

- Who will employ the staff
- Who will administer the project
- Where will the project be based
- Who will provide the rest of the project funding
- Who will manage the project
- What business are we in?

3) VALUE FOR MONEY (you understand and have calculated the relevant costs)

- How has the project been costed
- Can it be broken down to unit costs
- What % of the cost is for management and administration
- How does it compare with costs of other projects

4) OBJECTIVES OF THE FUNDER (is the funder is prepared to fund this project)

- How do the objectives of the project fit with the objectives of the funder – make sure you are aware of the funder’s objectives **BEFORE** you apply

OTHER FACTORS TO TAKE INTO ACCOUNT WHEN WRITING A BID

- **DEADLINES** - Do bids have to be received by a certain date? Does the money have to be spent over a specific period? Are funds allocated over financial years?
- **OUTPUTS** - Are the services, activities or products the charity provides. These are quantifiable e.g. no of people, no of hours, no of qualifications
- **OUTCOMES** - Are the benefits, changes or other affects that happen as a result of the charity’s services or activities. These are qualitative and harder to measure e.g. reduction in teenage pregnancy, reduction in number of children taken into care.
- **MILESTONES** - Significant measurable events in the life of a project. e.g. recruitment of staff, official launch of project, production of publicity material
- **PAYMENT** - Is funding paid in advance or claimed retrospectively. Is funding output based? This may occur with Jobcentre or LSC contracts. Failing to deliver may result in the organisation losing money. Is some funding held back if project fails to meet its outputs.
- **MATCH FUNDING** - Unless the funder will provide 100% of the project costs you may need to find Match funding. This is often set at 50%.

EXIT STRATEGY - What will happen when the project ends.

- The project ends because the needs have been met e.g capital project
- The project carries on but is self sustaining e.g users pay for its services or it is delivered by volunteers. The project is mainstreamed - statutory funders take over the funding of the project. The need will continue after the project has needed - more funding required.

EVALUATION - Will the project be evaluated? You will need to keep records of expenses.