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# Fundraising Applications

This Information Sheet aims to support groups making fundraising applications. It will take you through the necessary steps for your group to:

- ★ Plan what you need funding for
- ★ Show how you will use the funding
- ★ Choose appropriate funders
- ★ Persuade them to fund your project
- ★ Write a Letter of Application or complete an Application Form
- ★ Know what to do if you are successful.

**If you are fundraising for a smaller event such as a Fun day or Children's Party your application will be a lot more straight forward and you may find our information sheet 'Fundraising from local businesses' more useful.**

Funders usually have set criteria that determine the type of projects they will fund. They will expect you to be clear about why you need money, and how you will use it, and how it fits their criteria.

It is easy to lose sight of your own objectives by trying to meet those of funders. So it is worth discussing fundraising with several members of your group at an early stage. To help do this consider the following questions:

- ★ What do we need money for?
- ★ Why is it important?
- ★ How will we use the money to achieve our aims?

Remember - you need to plan ahead! Some funders have a very quick and simple application process, but others consider applications on a 3 monthly or 6 monthly cycle.

Some like to meet you before you make a formal application. Others have an application process that involves several stages. If you are planning a big project it is advisable to apply for funding 6 - 9 months before you are going to start using it.



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## What do we need money for?

Many funders will only fund specific projects rather than provide general running costs for existing organisations. It is therefore worth developing your ideas into a project.

*For example:*



*An After School Club wants to expand and therefore needs money for wages for another worker and needs some new equipment. This could be packaged as a specific project that you would be able to run if you had extra workers. For example: a club on a different day; or for a particular age group; or activities such as art, music, drama, or outdoor activities. Any of these could involve:*

- ★ *Purchase of new equipment*
- ★ *Staff/volunteer wage or training costs*
- ★ *Professional advice from other organisations*

★ *Changes to your premises*

- ★ *Costs for administration and premises*

*Or: An Advice Centre wants to extend its services to a particular community. This could involve a new project of outreach work involving any of the following:*

- ★ *Holding advice sessions in alternative locations that rent would have to be paid for*
- ★ *Staff/volunteer wages or training costs*
- ★ *New equipment e.g. mobile phone, laptop computer*
- ★ *Purchase of reference publications, website access, or membership of specialist organisations*
- ★ *Costs for administration and premises*

If you really can't find a way to way to package your funding requirements into a set project, or would find this too constraining, you will need to look for funders that specifically fund running costs.

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You can find information from census and other sources at [www.statistics.gov.uk](http://www.statistics.gov.uk) and [www.bhlis.org](http://www.bhlis.org).

For links to the 2007 Indices of Deprivation go to: [www.communities.gov.uk/communities/neighbourhoodrenewal/deprivation/deprivation07/](http://www.communities.gov.uk/communities/neighbourhoodrenewal/deprivation/deprivation07/)

## Why is it important?

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Funders are far more likely to support projects that directly fulfil a need. They are interested in who will benefit from your project (*the children who will attend the new club, or those who will benefit from advice sessions*) rather than the needs of your group or organisation. You can show this in the following ways:

- ★ Use the census and other statistics held by your local council/police/health authority to show that there are people who need what you are going to provide
- ★ If any surveys have been carried out in the area to show that people want what you are going to provide – use them!
- ★ Explain how your project will make a significant impact on the lives of those who use it. *e.g. will the children from the After School Club develop confidence, skills, and awareness?*

## How will we use the money to achieve our aims?

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You will need to show funders that your organisation has the experience to make your project work, and that you have a clear plan of how you will run it. Discuss the following questions to formulate a plan.

- ★ What methods will you use to run your project?  
*For example: will the after school club focus on group activities led by staff or volunteers, quiet space for children to do homework, one-to-one time with children. Will drinks or snacks be provided? Will the advice sessions be open to all, will priority be given to certain groups, will they be by appointment? Have you thought about times and venues that are accessible to potential users?*
  - ★ Why have you chosen these methods? Have they been used by yourselves or others successfully before?
  - ★ Publicity - how will you let potential users know about your project?
  - ★ Items to purchase – what exactly will you need, and how much will it cost?
  - ★ Planning staff and volunteer time – what hours will people work and what will their responsibilities be?
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- ★ Venue - is it suitable/accessible to potential users? Are any alterations needed?
- ★ Insurance - what insurance will you need, have you got quotes?
- ★ How will this project fit in with the rest of your organisation?

## Project Budget

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It is very common for funders to ask for a budget for your project, or your whole organisation. This is :

- ★ a list of everything you will have to pay for, and how much each item will cost
- ★ a list of your expected income

When preparing your budget remember these guidelines:

- ★ Be accurate. Guessing can mean that you don't apply for enough money, or that your application does not look well thought out.
- ★ Don't under cost. This could lead to financial problems that affect the other activities your group is involved in.
- ★ Don't over cost. This can lead to your application being rejected.
- ★ Don't miss out 'hidden' costs like: insurance, travel, payroll, maintenance, repairs, lighting, heat etc.
- ★ State whether costs are capital (one-off purchases of specific items) or revenue (ongoing costs such as rent, transport, services or wages)

## How will we know if we've achieved our aims?

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When you make your funding application you will need to state how you will know if your project is successful. To do this you will use monitoring and evaluation.

Monitoring means collecting and recording information about what you do. Activities can be monitored in different ways, like recording the numbers of people attending the Friday night youth club sessions, or asking what people thought about the activities that were organised.

Evaluation means reviewing how things went by looking at the information that was collected and assessing how worthwhile the activity was.

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*For more information on how to prepare a budget see the Resource Centre Information Sheet: Budgets for Community Groups*

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*Our Information Sheet on 'Monitoring and Evaluation' provides more detail and some examples of monitoring and evaluation.*

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Funders are interested not only in the numbers of people involved in activities, but also the quality of their experience. So, you might organise an event for a small number of people, but everyone there gets a lot of support and information and finds it very helpful. Record the number and types of people attending events, plus any information that shows how people benefited. This could be done through a survey or chatting to users at the end of the activity.

## What else will funders want to know about?

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Most funders will want to see evidence that your group has:

- ★ A Committee
- ★ A Bank Account
- ★ A statement of your accounts for the last financial year
- ★ A Governing Document (e.g. Constitution, Trust Deed, Memos and articles)

Some funders will also ask for evidence of:

- ★ Insurances
- ★ A Risk Assessment showing that you have addressed all Health and Safety requirements
- ★ Equal Opportunities Policy

They will want to be confident that you can deliver the proposed project competently, so may ask for information about:

- ★ Your main purpose or aims
- ★ How long you have been going
- ★ The highlights of what you have done so far
- ★ How many staff, volunteers and members you have
- ★ What legal structure you have, whether you are a charity, or whether you are a limited company
- ★ What other funding you get
- ★ Evidence of your financial and managerial competence

A lot of this will be in your governing document or annual accounts. If you keep other records, such as an Annual Report, you may need to draw the funder's attention to specific sections of these documents.

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*For more information on Governing Documents see our information sheets: 'Community and Voluntary Groups: A guide to legal structures' or 'Constitutions'*

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*See our Information Sheet on how to write an Equal Opportunities Policy.*

*We also have some sample policies from other organisations on our website at:*  
[www.resourcecentre.org.uk/information/policies\\_procedures/sample\\_policies/index.asp](http://www.resourcecentre.org.uk/information/policies_procedures/sample_policies/index.asp)

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It is common for funders to ask for details of a referee who can vouch for your organisation. This will need to be somebody who is not a member of your group, but is familiar with what you are doing, and the project for which you are applying for funding. Remember to ask them before you list them as a referee, and brief them so they can speak convincingly and positively about your organisation if they are contacted.

## What funders should we apply to?

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There are a range of Trusts, Companies, Individuals or Statutory Bodies that give funding. The Resource Centre has the following information about funders, which is available to all local Community and Voluntary groups.

- ★ Favourite Funders lists a selection of funders that small to medium size local groups have received money from. It includes some details about each funder.
- ★ Trustfunding .org is a subscription website available for use in the Resource Centre. It is a searchable database of over 4000 Trusts from the Directory of Social Change.
- ★ Our Library has a wide selection of books on fundraising techniques and sources of funding.
- ★ Our website has links to other useful fundraising websites.
- ★ The Beachcomber section of our website has information about other support and resources that you may need.



It is worth selecting a few funders that clearly state they want to fund projects such as yours, then finding out a bit more about them:

- ★ Do they fund projects in this area?
- ★ What have they funded in the past?
- ★ What size grants do they give?
- ★ When is their next deadline?
- ★ How simple or time consuming is their application process and monitoring requirements if you are successful?

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*Favourite Funders is available on our website and in a file in the Resource Centre.*

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You may decide to apply to one funder for your whole project, or to a range of funders.

For example, you could apply to one funder for a worker's salary, another for equipment, and another for a computer.

Some funders like you to apply to a range of funds for a project, and consider it a bit 'lazy' if you just ask them for the entire costs of a project. Others will require you to 'match' their funding with a set amount from elsewhere. On the other hand, some funders prefer to fund most or all of a project themselves.

Remember that your applications will not always be successful so it is important to have other potential funders to apply to.

## How can we persuade them to fund us?

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Funders get hundreds or thousands of applications a year. You need yours to stand out by showing that:

- ★ You believe in your project and have confidence that you can deliver it
- ★ You have thought it through and planned it carefully

You can develop this by:

- ★ Practising talking to each other about it, or writing down the aims of your organisation and project

- ★ Taking up any opportunities to talk to funders before completing an application letter or form.

Some funders put on open days or stalls at local events, or invite you to contact them to ask questions, clarify issues, or discuss your draft application with you. These can give you some valuable feedback that could make the difference between your application being accepted or rejected. Before you meet them make sure that you have clear idea of what you want.



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## Writing a letter of application

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If funders have standard application forms use them. If not, you will need to write a letter.

Focus your letter on the aims and criteria of the organisation you are applying to, and how your project fits into these. Do not send standard letters. Your letter should be:

- ★ On headed paper.
- ★ Addressed personally to the named contact for the funding body.
- ★ Short and to the point. Keep your letter to 2 sides of A4. Focus on providing relevant information about your group, what you want to do, and why it is worth funding.
- ★ Written in plain language. Do not use jargon or abbreviations.
- ★ Factual. Try to back up any statements with factual information.
- ★ Signed by a member of your group who can be contacted for further information.

Some funders will tell you what to include in your letter. If they don't, use the following list as a guide:

- ★ Project Title.
- ★ An introduction to your group including your aims, key achievements to date, support from other bodies.
- ★ Summary of the project proposal including cost.
- ★ Why the project is important and how it will benefit its users.
- ★ A description of the project and how you will run it.
- ★ A summary of how you will monitor and evaluate the project.
- ★ A summary of other funders.
- ★ Finish the letter with an offer for them to contact you for more information.

It is useful to attach the following documents to your letter:

- ★ Project Budget
- ★ A Governing Document (e.g. Constitution, Trust Deed, Memos and articles)
- ★ Last year's accounts

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## Completing an application form

When you complete an application form follow these few basic guidelines:

- ★ Take a photocopy of the blank form to use as a rough draft.
- ★ Give yourself enough time to do a bit of extra research to ensure you can answer all the questions fully.
- ★ Be clear, precise, and positive about your group and your proposed project.
- ★ Always be aware of the funders' guidelines and criteria when you are answering the questions.
- ★ Do not put anything in a covering letter that should be on your form.
- ★ Keep to the deadline. Late applications will be ignored.
- ★ Ask somebody else to check your form thoroughly before you send it off.
- ★ Take a copy of your completed form.

## What will they expect of us?

Always write to funders and thank them if your application is successful. You never know when you will want to apply to them again.

Your funder(s) will want you to show that you are using the money effectively, and that your project is achieving its aims.

Therefore you will need to have a system for monitoring and evaluating your project.

Some funders will be very specific about the information they want, and the way they want it to be presented. You will need to start monitoring right at the start of your project.

Even if you are not asked for information, it is worth writing to funders to let them know how your project is doing, and highlighting any particular successes.



*See the section above on 'How will we know if we've achieved our aims?', and our information sheet: Monitoring and Evaluation*