



THE SIX SECRETS OF SUCCESSFUL FUNDRAISING

GET THE TARGET RIGHT

Trust funds are run by ordinary human beings – trying to reduce their frustration and exasperation is bound to help them look more favourably at your application.

The responsibility for identifying a correct target for a funding application is yours alone. To help make sure you get it right, think;

Why have you chosen this potential funder?

Maybe you ran a 'criteria' based search on a funding database? If you took details from a hardcopy guide or directory – maybe at your local library - check the details are current as it may have been produced several years ago.

Does the potential funder have a local connection?

Is there a geographical criteria to be met?

Have you checked your eligibility?

Are they interested in / do they support your type of project?

50% of all grant applications are ineligible for one reason or another.

Funders will only work with the beneficiaries – or fund the areas of work - that they state. Pay attention to what they say;

- o *do they support work with youth groups / older people / ex-offenders etc?*
- o *do they cover start up costs, capital projects, running costs, salary costs?*

If you feel that something is not covered in the published guidelines, then phone the funders and check.

Have you received support from them before?

If so, check the details of when / for what / how much then provide them with a progress report / update on the project. Invite them to visit your group to see the tangible effects of their support in the past.

GET THE DETAILS RIGHT

Once a second rate application has gone in the post there will be NO opportunity to put things right / improve it / add documents – your application will end up in the wastepaper basket.

Start as you mean to go on – with accuracy and clarity. When you're asking for money there is no such thing as 'just a small detail'. There is no excuse for presenting your application in a less than perfect format.

The Envelope Make sure the postal details are correct / up-to-date, that you've got the full address, and that you've attached the correct postage!

The Correspondent Research who your bid should be addressed to. If applying to a trust find out the name of The Clerk to the Trustees. Always make sure you use the correct title and spelling of the contact name.

The Date Check you've written this correctly. This is especially important if you're 'cutting & pasting' from other bids. I don't endorse this as it's really just a disaster waiting to happen but I do realise that sometimes time pressures demand it.

The Format Never submit an application using a different format from the one detailed. Always follow the funder's instructions. Some applications nowadays are required to be submitted on line. If you feel you may struggle with this then find someone else in your group who feels more confident and do it together.

The Signature Include one! Believe it or not many bids are sent in with none. Even more amazing is the fact that some are sent with no contact details.

The Enclosures What documents were required to accompany your application? Accounts (are they for the correct year?), your constitution, copies of policies, photos. Are they enclosed?

The Double Check **Always** get at least one other person to check the application and comment critically on it, preferably someone who is unfamiliar with your work, or at least isn't too closely involved with it. I'm always happy to check applications and if you're not cutting things too fine with the timing, please email me chris.carman@dorsetcommunityaction.org.uk

Always take a photocopy of the application and everything you send with it. Work out an efficient way of keeping your records. Create a log of what the application was for / how much was asked for / the status of the bid and who is dealing with it.

GET THE INFORMATION RIGHT

Remember that Trust staff are as busy as you and – as you're asking them for something and not the other way around – they won't be impressed if you expect them to research your project to get the facts that they need.

Applications are a means of communicating what a charity does and what, in particular, it requires money for. Bear this in mind and come to the point quickly, stating clearly;

- what your group does
- what the money is required for
- why it's needed now.

Don't use initials or abbreviations for anything – write everything in full, at least the first time it appears in your text.

Check how much money a funder has available for distribution in any period of time.

State **exactly** the sum of money you're asking for. Not only will this will show that full costings for the project have been carried out, it will demonstrate a level of fiscal prudence on your part. This is the crux of any funding bid. Unfortunately it's the part that many people feel least comfortable with. Seen from a funder's point of view though this is the most important piece of information in any application because it enables them to manage their budget. Don't try to shift the responsibility onto the funder for trying to decide the amount of money you need.

Always give specific numbers, not percentages, of;

- beneficiaries of your service
- users of your facility / product
- frequency of your service / meetings / visits
- how many more people need what you're offering.

Give details of how you will be evaluating your project.

How will you be able to measure its' success? What system do you have for recording the results?

Give details of how you will be reporting on your project's progress.

Check if there are requirements from the funders on the format and frequency of how this should be done.

GET THE BALANCE RIGHT

Put yourself in their shoes then try to *engage* with your funder. Don't fall into the trap of using too many words with too little meaning – sound like a human being. It gives you the language of one friend to another.

Remember that you're competing for funds with equally deserving causes. Trying too hard to impress a funder is not helpful to your cause – especially when most people will be doing the same thing. So;-

- Be passionate but not over-emotional.
- Don't make emotive statements or unsubstantiated claims.
- Be realistic – don't provide a shopping list of needs.
- Only ask for funds for something for which you can provide evidence of need.
- Use the right language – don't use jargon or fussy / unnecessary words. But also don't resort to being too formal – you could end up tying yourself in knots!
- Pay attention to grammar, handwriting and spelling so that your application can be clearly understood. Also, try to make sure that it's attractively presented, but without ringing any alarm bells that you may have been profligate with your admin budget!
- If the guidelines state a specific number of words / characters to be used then don't exceed it.
- If applying by letter and no length is stipulated, be sure not to exceed 2 sides of A4.

GET THE TIMING RIGHT

Read the guidelines very thoroughly – these are statements of fact ie THE RULES. It wastes everybody's time to presume they can be negotiated. Funders will never accept applications after the deadline.

Check that the funding stream is currently open and accepting applications. This is particularly important at the moment as the current economic downturn has its effect and some funds are closing early.

Check if there is a deadline date for applications and make sure that your application will be received BEFORE that date. Remember that all information about dates and other eligibility criteria will be available by accessing the funder's website or telephoning their offices.

Send your application by special delivery if necessary.

Phone to check the application has been received.

Find out and note any 'expression of interest' stipulation made by the funders.

When applying to grant-making Trusts check how often and on what dates Trustees meet, then find out how long before the meeting they need to have received applications.

Make sure that your project fits in with these dates. For example – don't ask for funding to deliver a Summer Play Scheme if the next Trustees' meeting is not until 1st September.

Keep the potential funder up-to-date with any significant changes that occur during the time that your application is being processed. This is especially important if the changes have a bearing on your application for example;

- You have success in obtaining partial funding from another source
- There has been a material alteration in the project – and the reason why
- You've received an award - or recognition of an achievement - that reinforces your organisation's ability to deliver the project.
- There has been a change to the contact details for the project or application.

GET THE MONEY – KEEP THE MONEY – GET MONEY AGAIN

'Charities manage to find time to write asking for money in the first place, so surely they have time to jot down a few words of thanks? Saying thank you should be considered an integral part of fundraising'.
Hilary Blume. Director. Charities Advisory Trust.

When you hear the good news, immediately acknowledge receipt of the grant, always in writing but personally as well where appropriate. Do this within the time scale stipulated. If a funder asks for an acknowledgment within 14 days, provide it.

Claim the grant efficiently by following the procedure and time scales stipulated. Cash the cheque immediately. When there is a delay claiming – or cashing - a grant payment from a funder it's reasonable for them to ask whether the money is really needed.

To make sure you can keep the money –

Comply stringently with any follow up requirements ie reports / evaluations etc.

Make sure you're able to use the money within any set timeframe.

If you have been awarded a grant as part funding for a project but then it looks as if there may be a delay amassing the rest of the necessary funds, get in touch with your funder immediately and let them know the situation.

Finally, to give you the chance of getting money from the funder again say 'thank you', not only is this an elementary courtesy, it is also proven to increase an organisation's chances of successful bids to that funder in the future. Never send a thank-you letter with a request for money. Keep the two acts separate so as not to devalue your gratitude.

Work hard to build a relationship with your funder. Most trust money is given to groups who the trust already knows, likes and trusts with their money. This is an extremely important point. Having won a bid from a funder you will be missing a golden opportunity if you don't foster their interest for the future. Get the funder involved with your group, send them news of the project, include photos, invite them to visit.

Keep efficient records of which funds you have applied to, when you applied, how much you received and when you can apply again.