



**Fundraising Workshop 2:
How to formulate an ask.**

Tracey Shibli
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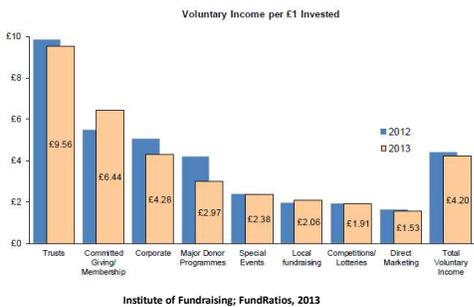
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Introductions

- Name
- Who do you work for and/or what do you do?
- What experience do you have of asking for money?
- What would you most like to ask?

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Who should you be asking for money?



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Types of ask

- Individual giving
 - High net worth individuals
 - Community campaigns
 - Membership schemes
 - Donations
 - Legacies
- Crowd Funding
- Trusts & Foundations
- Commercial Sponsors

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What is involved?

- **Individual giving**
 - 6 degrees of separation
 - Stewardship
 - Recognition
- **Crowd Funding**
 - Campaign marketing
 - Often used to 'top up' a large project's income target.
- **Trusts & Foundations**
 - Thorough research
 - Initial enquiry by phone or email
 - Written request: online application form or letter
 - Criteria or guidance to meet
 - Competitive process (11% of applications successful)
 - Public votes
 - Sometimes a multi-stage process
- **Commercial Sponsors**
 - Elements of both individual giving and bid writing

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What information do I need?

- Organisation/personal background including legal status
- Project title
- Project details
- Evidence of need
- Plans to promote the project
- Outputs, outcomes and impact
- Budget and financial background
- Specific supplementary questions

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Organisation Background

Individual activity

In no more than three sentences can you describe your organisation, whilst including the following information:

- Organisation type
- Year established
- Aims and objectives
- Number of staff/volunteers
- Where you are based and operate
- Main activities

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Organisation Background

Regular mistakes

Check the following are correct:

- Registered organisation/trading name
- Year established
- Organisation legal structure
- Turnover
- Matching information on your website

If something may cause confusion, provide an explanation.

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Organisation Background

Organisation Types

The most common organisation types are:

- Unincorporated association (often used by not for profit community groups e.g. choirs)
- Registered charity
- Charity incorporated organisation (CIO)
- Company limited by guarantee (Ltd)
- Community interest company (CIC)
- Community amateur sports club (CASC)
- Industrial and provident society

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Group Activity

When writing a bid or proposal, which of the following is most important?

1. Applying for less money than you had planned
2. Matching your project outcomes with the aims of the funder
3. Using the right 'buzzwords'
4. Using a consultant to write your application
5. Being a well established organisation
6. Well developed project or project idea
7. Clear evidence of why your project is needed

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Group Activity contd.

1. Matching your project outcomes with the aims of the funder
2. Well developed project or project idea
3. Evidence of need
4. A well established organisation
5. Applying for less money
6. Ask a consultant to write your application
7. Using the right 'buzzwords'

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Aims of Funders

Elephant Trust
"To bear in mind at all times an original, inquisitive, open-minded, generous and unshockable approach to art in all its forms with a bias towards the visual arts."

Priority is given to artists in the fine arts and small organisations and galleries who should submit well argued, imaginative proposals for making or producing new work or exhibitions.

Fenton Arts Trust
Grants are available to support individual works, activities, performances or prizes in the fields of drama, painting, sculpture, ballet, music, poetry and architecture. An application may come from a group, company or institution, or from an individual so long as the application does not involve support of an individual's professional training at any level.

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Aims of Funders

Split Infinitive Trust
 The Trust's main area of interest is in supporting live and performance arts, in general and in education. Applications with a Yorkshire focus are favoured. Split Infinitive is a small trust with limited funds to distribute annually. Average grants fall between £250 and £750. They may be awarded to individuals or to organisations for specific projects.

Freshgate Foundation
 "...supports ideas which are likely to make life more bearable, cheerful and attractive to people who have a limited choice in the occupations they follow and the locality and surroundings in which they live." Gives to registered charities, small local groups and holiday clubs.

Sheffield Town Trust
 Established in 1297, it is one of the oldest charities in England. The Trust has a disposable income of about £450,000 per year which is distributed 'for charitable and public purposes' for the benefit of Sheffield and its inhabitants. The Trust supports a wide range of groups and organisations.

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Increase your chances of success

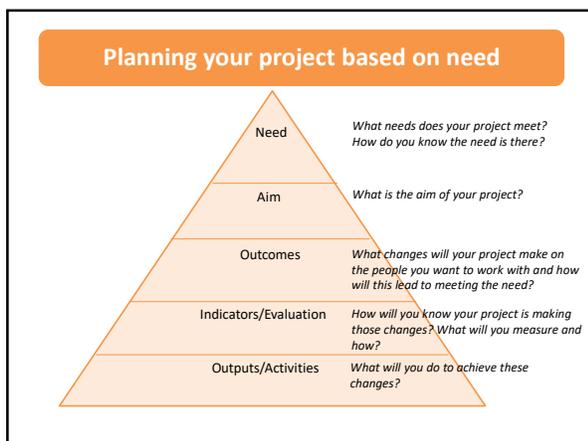
- **Know your funder...**
- Apply to funders who are most interested in your line of work and social objectives.
- Use their language.
- Apply for amounts similar to their recent grants.
- Is your organisation similar to those funded previously?
- Build on existing positive relationship with funders.
- Answer the questions (all of them!).
- Apply at the right time.
- Evidence need for your work.
- Prove you can do the work.
- Explain the outcomes you will achieve.
- Explain how you will evidence the outcomes.

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Researching the Funder

- Funders website
- Charity Commission website (annual reports)
- Read and re-read the funder's grant guidelines
- Check for details of recent grants
- Case studies
- External references
- Application form
- Speak to them
- Funders Fairs

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- Arguing Need**
- National data/statistics (Indices of Multiple Deprivation)
 - Local data/statistics (Ward profiles)
 - Anecdotal evidence
 - Requests from local people
 - Requests/quotes from local agencies
 - Consultation/local survey
 - Research documents
 - Case studies
 - Focus groups

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Outputs and Outcomes

Outputs: The things that you will do.
We will deliver a 12 week programme of dance workshops for 10 children aged 7-11 with a diagnosis of ASD and their parents.

Outcomes: The changes that occur as a result of the things that you do.

Core outcome

- Improved core stability, balance and co-ordination
- Improved tolerance to new sensory sensations
- Improved self-esteem and self-confidence

Subsidiary outcome

- Parents will experience decreased isolation and increased peer support.

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Amending Outcomes

Do you match the right funder to your project OR match the project to the funder?

Developing a project purely to match the objectives of a funder must be approached very cautiously and with the following principles:

- new projects must have some link to current core work;
- new projects have a positive impact on your core work (income, exposure, etc);
- maintain a commitment to core work and outcomes of group;
- don't stockpile projects and equipment for the sake of it;
- new projects are delivered in full and outcomes achieved.

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'Outcots'

Through a six-week programme of dance workshops, 12 children aged 7-11 with a diagnosis of ASD will enhance their physical and mental well-being. Activities will be designed to develop core stability, balance and co-ordination, rhythm and acquiring new skills which will build self-confidence and self-esteem. Parents will be invited to take part in the sessions so that they benefit from decreased isolation and increased peer support.

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Measuring Impact

What does success look like?

Quantitative measurements e.g. number of workshops, performances, sessions, participants, audiences. These are your **OUTPUTS**.

Qualitative measurements e.g. how people benefit. These are your **OUTCOMES** and are harder to measure as they are about what has changed.

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Impact Measurement

Impact measurement tools

- Registers, box office data
- Surveys and questionnaires
- Evaluation forms
- Learning quizzes
- Video blogs and interviews
- Photographic records
- Reflective practice
- Warwick-Edinburgh Mental Well-Being Scale (WEMWBS)
- The Outcomes Star

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Budgets

- Ensure they are accurate and match your actual planned spend.
- Project budgets should relate to your organisation budget.
- Check what the funder considers as eligible expenditure.
- Full cost recovery means securing funding for all the costs involved in running a project. This means that you can request funding for direct project costs and for a proportionate share of your organisation's overheads.
- Funders will look for value for money but very few assess "cost per head".
- Be realistic about other anticipated income and how you will meet any 'funding gap'.

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Assessment Process

- Applications are usually scored against an Assessment Framework
- Recommendations are made by the assessor/Grants Officer
- Final Decisions by Trustees/Senior Management
- 'Easy Rejects'

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'Easy Rejects'

Rejection Reasons

- Ask for too much money
- Ineligible organisation type
- Missing information
- Wrong organisation turnover (doesn't match your accounts)
- Profit making organisation
- Boxes not completed

Directory of Social Change research showed that 37% of applications make a mistake like this.

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Top Tips

- Writing style can influence an assessors scoring.
- Make project background relevant to the project being delivered.
- Ensure the outcomes link to the aims of the grant programme.
- Re-read questions and provide all information requested.
- Questions can provide hints to what they want a project to achieve.
- Proof read your application and get someone else to double check it for accuracy and sense.

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Top Tips

- If you can, use a mixture of 'internal' arguments and external statistics.
- Ensure you link your need to your outcomes and the funders outcomes.
- Reuse your answers in future applications.
- Create a document of 'banked' arguments, evidence and statistics.
- Research local, regional and national evidence.
- Use Google to collect quotes from national and local research and reports to evidence need.
- Keep excellent records of ALL applications.

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