

TIPS TO WRITING A SUCCESSFUL FUNDING PROPOSAL



Havering
LONDON BOROUGH

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Ingredients of a Good Application

Meets the criteria

- Check income threshold
- How does your idea fit the fund?

Got a plan

- Make sure you have everything in place before applying
- Project is ready to go, just need the £££!

Clear & Simple Language

- Avoid jargon
- Short sentences and bullet points
- Answer the question

Use of Evidence

- Have you any statistics or reports?

Sell Yourself

- What is unique about your project?
- How does your work fill a gap?

Use Accurate Costings

- Itemise budget
- Does it add up?

Check to make sure you have answered everything

Get someone else to read it, preferably from outside of your project

A Fund-raising Health Check

A self-assessment checklist

Name of organisation:

Date completed:

This checklist will help your organisation to assess how well you meet the requirements of funders and supporters. A wide range of people should ideally be involved in completing this checklist (trustees, members of staff, young people and volunteers) as there may be completely different opinions about how your organisation is working and what it is achieving.

1. Meeting a clear need

It is important that all services provided are in response to the needs and views of the users of your group/organisation or the local community and take into account the needs of those who are most isolated and marginalised.

| Is your user group clearly defined? | Comments: |
|--|-----------|
| Do you have statistics about young people in your area? | |
| Do you have a clearly stated purpose? | |
| Do you ask young people what they think of your services? | |
| Do you keep records of services provided and enquiries dealt with? | |
| Do you regularly review and evaluate your services? | |

2. Planning

The most successful organisations are those that plan effectively. Good planning will mean your organisation will achieve more and will have a greater impact.

| Do you have an annual plan that is written and implemented? | Comments: |
|---|-----------|
| Do you have a long term plan e.g. 3-5 years? | |

3. Ensuring that you are a well-run organisation

Organisations must meet the legal requirements placed on a charity. They must also meet general legal requirements as employers and service providers: licensing, employment, health and safety and equal opportunities.

| Charity Law | Comments |
|---|----------|
| Are you registered as a charity? | |
| Do you have a written constitution that is up to date and covers all your activities? | |
| Are your management committee members aware of their legal powers and duties and their personal responsibilities? | |
| Do you return your annual reports and accounts as required by the Charity Commission and SORP? | |
| Are you aware of the legal and licensing requirements for activities and fundraising? <ul style="list-style-type: none"> • Trading • Collections • Lotteries and raffles | |

| Management Committee | Comments |
|---|----------|
| Does the management committee meet often enough to carry out its business? | |
| Do you have members with relevant experience? | |
| How do you support young peoples' representatives on the management committee so that they can participate effectively? | |
| Do members have clear roles and responsibilities? | |
| Are meetings well organised? | |
| Are effective decisions made? | |

| Equal Opportunities | Comments |
|--|-----------------|
| Do you have an equal opportunities policy/statement? | |
| Do you comply with the laws relating to equal opportunities? | |

| Premises and equipment | Comments |
|--|-----------------|
| Do your premises meet your needs? | |
| Are your premises and equipment properly insured? <ul style="list-style-type: none"> • Public liability • Employers liability • Buildings insurance | |

| Health and Safety | Comments |
|--|-----------------|
| Do you have a written health and safety policy? | |
| Do you carry out regular risk assessments? | |
| If your work with young people involves food, does food storage, preparation and delivery meet relevant legislation? | |
| Are vehicles and equipment well maintained? | |

| People | Comments |
|---|-----------------|
| Do you have procedures for staff and volunteer recruitment and selection? | |
| If you employ staff do they have job descriptions, contracts and terms of employment? | |
| Is there a clear line management structure? | |
| If you employ staff do you have employment policies for grievance, disciplinary, induction, sickness, holidays, pay, expenses and redundancy? | |
| Do you provide regular support and supervision for staff and volunteers? | |
| Do you have a volunteer policy? | |

| Training | Comments |
|---|-----------------|
| <p>Is training provided for</p> <ul style="list-style-type: none"> • Management Committee? • Staff? • Volunteers? • Young people? | |

| Other policies | Comments |
|---|-----------------|
| Do you have a confidentiality policy? | |
| Do you have a child protection policy and a set of child protection procedures? | |

| Finance | Comments |
|--|-----------------|
| Is all income clearly recorded and accounted for? | |
| Do you have systems in place to provide good internal controls and are these written down? <ul style="list-style-type: none"> • Banking and cheque signing • Petty cash • Retention of receipts • Authorisation of expenditure | |
| Do you produce an annual budget? | |
| Does the committee get regular financial reports (at least quarterly)? | |
| Are your accounts audited or independently examined? | |

| Partnerships | Comments |
|---|-----------------|
| Do you have good contacts with other relevant agencies in your area? | |
| Is written information about your organisation and services available to other organisations? | |
| Do you hold information about other relevant organisations? | |

| Celebrating success | Comments |
|---|-----------------|
| Do you make sure that other people and organisations know about your successes? | |
| Do you hold information about other relevant organisations? | |

4. Finding resources

When you are sure that you can meet the requirements of funders **then** you are best placed to start to look for funding

| Do you have a plan of what you want to do? | Comments |
|--|----------|
| Do you know how much money, people and equipment you need to achieve your plans? | |
| Do you have enough information about sources of funding and other resources? | |
| Do you have the skills and expertise in making good applications? | |

Next Steps

Now that you have completed this checklist you will probably have identified many issues and areas of work that you need to work on before you can begin to fund-raise. You can begin to list these, this will form the basis of your fund-raising action plan and act as a guide.

Fundraising Action Plan

Date:

Organisation:

| Area of work | Cost | Potential funders | Deadline | Training/resources, support needs | Notes |
|--------------|------|-------------------|----------|-----------------------------------|-------|
| | | | | | |
| | | | | | |
| | | | | | |

Basic information to begin fundraising

| | |
|---|--|
| Name | |
| Address | |
| Contact person | |
| Phone | |
| What are your aims as an organisation? | |
| Number of people attending activities | |
| Ages of the people attending | |
| What type of activities do you run? | |
| Why were you established? | |
| How do you know that your service is needed | |
| How do you ask people what they need? | |
| Which other community organisations do you work with? | |

Developing a Project Profile

This activity aims to provide you with a guide to help you write a fund-raising proposal.

The organisation

What is the name of your organisation?

.....

What are the aims of your organisation?

.....

.....

Are you a registered charity?

.....

When did you begin this work?

.....

Why did you establish the organisation?

.....

.....

The Project

What services and activities do you hope to develop?

.....

.....

.....

How do you know there is a need for these services/activities?

.....

.....

.....

Where and when will these activities take place?

.....
.....

How will the users of the project benefit from your services?

.....
.....
.....

Are there any volunteers working on the project?

.....

How do you support and train volunteers?

.....
.....
.....
.....

Do you give people an opportunity to say what they think about your services?

.....
.....

The Management committee

Do you have a management committee?

.....
.....

How many members are there? Do you have young peoples' representatives on the committee?

.....

How often does the committee meet?

.....

What skills do members of the committee have?

.....

.....

Networking and partnerships

Do you work closely with other relevant organisations?

.....

.....

Do you have any links with London-wide or national agencies?

.....

.....

What support does your project have in the community?

.....

.....

Financial management

Who is responsible for the financial management of your organisation?

.....

Do you have a budget?

.....

How do you plan your income and expenditure?

.....

Who currently funds your organisation?

.....

.....
Do you need more money? Why?

.....
Monitoring

What systems do you have in place to keep track of your project? e.g. registers, attendance records, progress charts, action plans, comments books, records of meetings .

.....
Evaluating

What do you do well, how are you successful?

.....
.....
How do you know this?

.....
Your Project

Summary

What do you need funding for?

.....
What is the project and who is it for?

How much are you asking for?

.....

Description of the project

.....

.....

.....

What will the project do?

.....

.....

Why is this project needed?

.....

.....

How do you know this?

.....

.....

Where will it take place, when and how often?

.....

.....

Achievements

What do you hope to achieve?

.....

.....

Who will benefit from the project?

.....

How will the community benefit?

.....

Are there any similar projects to yours?

.....

How is your project unique?

.....

Budget & Income

Are you applying anywhere else?

.....

Do you raise any funds yourself?

.....

Do you receive gifts in kind (free)?

.....

Expenditure

How much will it cost?

.....

How can you break down the costs e.g. volunteer expenses, publicity etc?

.....

.....

.....

.....

.....

Building Relationships with Funders

- ◆ Give **accurate contact details** with your application
- ◆ **Promptly** return calls/emails
- ◆ **Read all correspondence** thoroughly and make sure you fully understand the details in the offer letter.
- ◆ **Conditions of Grant** – essential to comply to these. Seek advice from the grants officer if you have any concerns or need to clarify any of the conditions
- ◆ **Plans change?** It is common for plans to alter as projects develop – this is not a problem! However, you must keep the funders informed of any changes to the project, especially the project budget. If you wish to alter the spend of the grant, **seek permission from the funder before proceeding**. If you do not keep them informed, you may jeopardise future funding.
- ◆ **Keep accurate financial records**, including receipts. If a monitoring visit is carried out, the funder will want to look at these.
- ◆ **Monitoring and evaluation** of your work. Set up systems to measure the success of your project as soon as you receive the grant. This will make the End of Grant Report simple to complete. **End of grant reports will be the basis for any future grant considerations** – ensure you complete and return it to the funder by the specified deadline.

Above all, enjoy your relationship with your funders. Do not be afraid to speak to them and ask for advice about your work. They want your project to succeed. Stay in touch and treat them as you would want to be treated yourself.