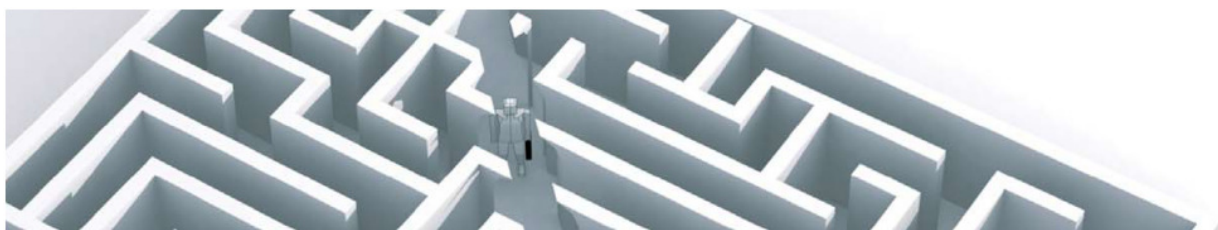




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Advice Guide for a new Funding Adviser

Well, got the job, dressed to kill, know where the coffee is, checked out the desk, phoned my friend – just hope nobody asks me anything! It can be a really daunting position to be in – adviser. We get a job we think we can do and then have to go about the, sometimes painful, process of learning how to do it. Where do we start? Check out the Internet. Well there is masses of stuff there that will boggle your brain and anyway what does it mean?

Everyone assumes that you have, at the very least, the rudiments of understanding the funding process. This is where you could feel a little exposed and vulnerable. The thing is that everyone in any job forgets what it is like to be new. There is a lot of information out there but what language is it written in? Certainly nothing that resembles the English language. How do you go about helping groups in a professional way without giving the game away and revealing that you are new to this and not sure of your way around? Thinks to self “If only there were a guide that would help new funding advisers.” Sigh.....

This booklet has been designed with just that thought in mind - to help Funding Advisers. It is aimed at the new adviser but could be equally useful for anyone else who works in the complicated and convoluted world of funding advice.

The advice in this booklet is intended to help you and to eliminate some of the confusion about where to go for help and advice. It is not prescriptive in any way and is not meant to dictate how a funding adviser goes about their business.

Thoughts from a new Funding Adviser

I began my new life as a Funding Adviser some little while ago now but can clearly remember how I felt. Maybe this will reflect your first days, maybe not, but let me tell you about it anyway.

I was lucky because I began my job with appointments already made with voluntary and community groups who work within a close proximity of the office. At once I felt I had arrived and it was just a case of getting to know the groups that I would be working with and the voluntary and community sector (VCS) in general. I had my eyes opened in those first few days, learning about the strain that the VCS is under and how fragile some groups really are. I met passionate people who cared very deeply about their projects and some who kindly changed my way of thinking.

Very soon though, I discovered that there was a new language to be learned – funding speak. This presented a problem as I had to rediscover familiar words that were now being used in a new way. There is a bewildering array of literature available (for those who can stay awake to read most of it!) and I soon realised that I would have to learn and teach at the same time. It was important to know about funding streams etc. when visiting a group who expected you to know something.

However, I rapidly discovered the art of side stepping by simply admitting that I didn't know, was new at the job but would find out and come back to them with information. This bought me some time to do exactly that and I discovered that most people appreciated my honesty and were happy when I returned with the information. I have stopped using the “I'm new” routine now, but still have to learn quite a bit to feel that I am equipped for dealing with requests.

The fun side, as anyone knows who works in this sector, is the flexibility, the challenge and the unexpected. I have held babies, held hands, offered shoulders for tears, drunk gallons of tea and even offered the occasional hankie all under the guise of meeting a group to discuss funding. Quite often a funding adviser goes to a group who request information about a funding stream and rapidly discovers that their constitution is not quite what it should be or their policies are non-existent or out-dated. Again it is the challenge that is the best bit.

The best part of funding advice has got to be seeing a group coming through that learning process of how to “speak the speak” and “write the bid”, as well as hearing of their success in receiving an award. Knowing that you have had a small part (but not always insignificant) in helping them to achieve success makes all the ploughing through endless email updates, sourcing information, understanding how grant-making Trusts might think, worthwhile.

Maxine Fiander, West Norfolk VCA

Welcome to Funding East

Funding East is a forum of people working in the field of community and voluntary sector development in the eastern region. The forum seeks to bring together funders and funding advisers so that they can work effectively together.

Funding East is made up of representatives of all the major community development funding streams in the region and a network of people working as funding advisers in voluntary sector and statutory organisations from one end of the region to the other.

The guiding principle of Funding East is to build effective working relationships between those who have funding available and those whose main or only job is to provide advice about funding.

We believe that effective relationships lead to constructive conversations and dynamic working partnerships. This allows funders to make the best investments possible, and advisers to easily access the most up-to-date, accurate, and pertinent information on behalf of their customers.

The mission statement of Funding East is:

Funders and advisers working together in the eastern region to facilitate the investment of funds for the development of communities and services.

Some of our key areas of work include:

- Exchanging information - Funding East works to ensure that funders know about each other's funding priorities, that advisers fully understand the funding streams in the region, and that funders have good access to relevant local information and can make informed referrals for advice and support. Events can be advertised by posting them on the Funding East website.
- Working together - Funding East works to encourage funders and funding advisers to work closely together, to meet regularly, and to contact each other to discuss applications and projects.
- Supporting - Funding East provides a forum for funders and advisers to provide support to each other in a non-competitive way. Many of our members work in relative isolation. This can be particularly daunting for new staff. Funding East offers quick and easy routes to get to know colleagues involved in funding from across the region. The Funding East website has a “Who’s Who” and also offers

a mentoring scheme. The mentoring scheme is there to offer advice and support to funding advisers. You can ask for a mentor to be geographically placed at the other end of the county if you prefer, or similarly select someone a little closer to the workplace.

- Learning from what works - Funding East provides a forum for funding advisers to learn about successful funding applications, community planning and consultation methods, and project planning. It provides a forum where funders can learn from each others mistakes and discuss how best to target particular funds for the benefit of particular communities.

Visit us on the web and get involved: <http://www.learnEAST.org.uk/funding.htm>

Funder - mental 1

Ten tips for Effective Fundraising

1. Give funders a helping hand

Their job is to distribute money, your job is to help them spend it wisely!

2. Make yourself fundable

Make sure you meet the minimum requirements for applying for a grant, e.g. have a bank account.

3. Make friends with funders

Effective fundraising is about building relationships.

4. Learn the language

Keep your applications clear and simple but learn the jargon.

5. Remember the 5 Ps ...

Preparation, Partnership, Presentation, Paperwork, and Passion.

6. Network, Network, Network

Whether we like it or not, who you know (as well as what you know) is important.

7. Funders give to people, not organisations

In the end your application will be judged on the perceived ability of the people delivering the project.

8. Get the basics right

For example, check you're eligible for funding by the organisation you're approaching.

9. How to avoid the dustbin

Read the funders guidelines and answer their questions concisely.

10. Match money with mission

Decide what you want to do and then find the money to do it, not the other way around.

Jargon Buster

The world of funding and of the voluntary and community sector is full of jargon. Here's a short guide to some of the most head-scratching common words and phrases you might come across.

Additionality – a way of measuring the benefits of a project which highlights the changes brought about which would not have occurred if the project had not taken place. Also known as **Added Value**.

Aims – description of the changes a project plans to achieve, or the difference it is intending to make.

Baseline Data – a starting point. Information collected at the start of the project. This can then be used to measure changes during and after the project.

Business Plan – a document stating what the organisation is proposing to do, how it is going to do it and a forecast of income and expenditure. It is usually based on the whole length of the project or up to 5 years for larger projects.

Capacity Building – helping people and organisations through a wide range of support, techniques and initiatives, which aim to develop their skills and knowledge so they can meet their aims more effectively. Such capacity is then retained for future projects.

Capital – money spent on the purchase or improvement of fixed assets such as land, buildings or equipment.

ChangeUp – ChangeUp is a government funding programme of capacity building for the infrastructure of the voluntary and community sector, developed in partnership with the sector.

Charitable – a loose term relating to aims and objectives that are designed to support improvements to society on a not for profit basis.

Compact – a written agreement between the voluntary and statutory sector stating ways they will work together.

Core costs – everyday running costs. These might include rent, utilities, telephone etc.

Criteria – the expectations of funders. Usually a list of things that must be fulfilled before a project will be funded. These will reflect the priorities and aims of the funder.

Delivery plan – often found included with the business plan. Shows what a project or programme intends to achieve, when, where and at what cost.

Depreciation – a tool used to account for the decreasing value of an asset as it is used over a period of time. Used to help to calculate the real value of an asset.

ERDF – European Regional Development Fund: a European structural fund which aims to reduce inequalities between the regions of the European Union (EU) by supporting local development.

ESF – European Social Fund: A European structural fund that supports activities that develop employability and human resources in five key areas; active labour market policies; equal opportunities; improving training; education and promoting lifelong learning; adaptability and entrepreneurship; improving the participation of women in the labour market.

Evaluation – an assessment usually carried out after the project or programme has started and again when the project is complete. It is designed to measure the extent to

which the objectives have been achieved, how efficiently it was done and whether there are any lessons for the future.

Exit Strategy – a written plan detailing how the project will end or move from the current funding into the next one. A very useful tool to focus the project.

Full Cost Recovery - the full cost of delivering services including the legitimate portion of overhead costs

Help in Kind – Non-monetary help. Examples include, volunteer time, free room hire and donations of equipment.

Impact – the difference a project is making

Inputs – A term used to cover everything that is needed to implement a project. Includes time, money, expertise etc.

Innovation – a new and different way of addressing a problem.

Local Area Agreements - are three year agreements that set out the priorities for a local area agreed between Central Government - represented by the Government Office - and a local area - represented by local authorities, Local Strategic Partnerships and other key partners at local level. The primary objective of an LAA is to deliver better outcomes for local people.

Local Strategic Partnerships - are single non-statutory bodies that bring together local public, private, community and voluntary organisations, generally at the level of District, County and Unitary councils. They work with the local community to identify and tackle key issues such as crime, unemployment, education, health and housing.

Match Funding – some funders will only give a contribution towards the total cost of a project and expect an organisation to raise the remainder themselves. This remaining 'match funding' can be cash, in kind support or funding from another funder.

Milestones – key events or outputs with dates marking stages in the progress of a project.

Monitoring – regular collection and analysis of the progress of the project and an analysis of the problems being tackled.

Mission Statement – a brief sentence stating the aims and objectives of an organisation (see the example from Funding East).

Outcomes – all the changes and effects that happen as a result of the work of a particular project or programme.

Outputs – the services and facilities delivered by an organisation. These might include, training courses, toolkits and publications.

Project appraisal – usually an independent process carried out by the funder to assess projects to make sure that they provide value for money and that they will tackle the problem to be addressed

Regeneration – a generic term to describe projects designed to improve the quality of life in areas which suffer from a wide range of economic, social and physical environmental problems.

Social enterprise – a project or programme with charitable aims that is placed on a business footing but re-invests its surpluses into the project or for other charitable purposes.

Social exclusion – a shorthand label for what can happen when individuals or areas suffer from a combination of problems such as unemployment, poor skills, low incomes,

poor housing, high crime environments and bad health - often the target of regeneration projects. Can be related to individuals, groups of people and/or whole communities.

Sustainable Communities – sustainable communities are places where people want to live and work, now and in the future.

Sustainability – in this context sustainability usually means the concept which relates to achieving targets that will enable a project to continue after the current funding comes to an end either with further funding or through some other means such as social enterprise

Targets – the quantity of outputs and outcomes aimed to be achieved by the project.

Acronyms

Acronyms are a thorn in the side of the funding adviser. Here is a brief guide to some that you're likely to see regularly.

ACE - Arts Council England

ACRE - Action with Communities in Rural England (sometimes called RCC's)

BiTC - Business in the Community

BLF - Big Lottery Fund

CAB - Citizens Advice Bureau

COVER - Community & Voluntary Forum: Eastern Region

CVS - Council for Voluntary Service

EEDA - East of England Development Agency

EERA - East of England Regional Assembly

EAGGF - European Agricultural Guidance & Guarantee Fund

ERDF - European Regional Development Fund

ESF - European Social Fund

FAWN - Funding Advice Workers Network

GO-EAST - Government Office for the East of England

HLF - Heritage Lottery Fund

liC - Investing in Communities

LAA - Local Area Agreement

LSC - Learning and Skills Council and Legal Services Commission

LSP - Local Strategic Partnership

NACVS - National Association of Council of Voluntary Services

NAVCA - National Association of Voluntary and Community Action (was NACVS)

NIACE - National Institute for Adult and Continuing Education

NCVO - National Council for Voluntary Organisations

RAE - Rural Action East

RCC - Rural Community Council (sometimes called ACRE)

SEEE - Social Enterprise Eastern of England

SRB - Single Regeneration Budget

VCO/S - Voluntary and Community Organisation/Sector

WREN - Waste Recycling Environmental Limited

Useful websites

www.navca.org.uk/localvs/funding - A list of funding sources, suggested by members of the Funding Advice Worker's Network, published by NAVCA. Interesting sources of information which includes: publications, training sources, 56 websites, and regional voluntary sector networks contacts. Download from their website.

www.fundraising-skills.co.uk - An on-line course to develop skills and knowledge about trust funds, writing application bids, governance issues, how fundraising works etc.

For resources, trust fund info, fact sheets, background info and more, visit:

www.governmentfunding.org.uk – stay up-to-date with available government funding.

www.green-fish.org.uk

www.vas.org.uk very useful sites for downloadable resources/info.

www.ladder4learning.org.uk

www.acf.org.uk – the UK's national support organisation for grant-making trusts and foundations.

www.grant-tracker.org - Nice bits of information from this site in Northern Ireland. Easy to browse.

www.dsc.org.uk - information and training for the voluntary sector.

www.cvseast.org - for information about all CVS offices in the Eastern Region.

The Regional Perspective

This guide is primarily for people working in the East of England. The East of England is one of nine administrative regions formed by the government in 1999 and consists of the counties of Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk and Suffolk. The regional agenda is becoming increasingly prevalent and, at least for that reason, important to funding advisers working at a local level. Increasingly national organisations are forming along regional lines, this includes national funding streams. There are many regional organisations in the East of England, perhaps the three most important are: GO-East; the East of England Development Agency; and the East of England Regional Assembly.

From the perspective of a funding adviser it is useful to keep abreast of regional developments and research, as funders are increasingly interested in understanding how individual projects fit into a wider agenda. All three of these organisations can form a useful starting point for regional and local research.

The Government Office for the East of England (GO-East)

Established in 1994, the Government Office, or GO works with regional partners and sub regional partners to deliver the Government's policy and programmes within the region. GO-East provides representation for all of the major Government Departments in the region.

GO-East manages significant spending programmes on behalf of these Departments. In 2003/2004, Government Offices nationally were responsible for over £9 billion of Government expenditure.

GO-East are an important source of information and research relating to the region. Their website is a good place to start in the search for evidence to support individual funding applications. <http://www.go-east.gov.uk/>

Government Office for the East of England

Eastbrook, Shaftesbury Road, Cambridge. CB2 2DF

Tel: 01223 372500

East of England Development Agency (EEDA)

Each region has a Regional Development Agency which is primarily interested in the economic activity within the region that it serves. These interests include trade, looking at ways of attracting inward investment from UK and international sources, creating and safeguarding jobs and regeneration. They also provide support to businesses (including social enterprises) directly, and through the Business Link Network.

EEDA is a good source of knowledge on the physical regeneration of the more disadvantaged areas of our region. Two of EEDA's main areas of work are Regional Renaissance and Investing in Communities programmes.

The government has announced EEDA will close by March 2012. A summary of the business support programmes that are still open, future delivery plans and activities which have stopped can be found on their website <http://www.eeda.org.uk/>

EEDA

The Business Centre, Station Road, Histon, Cambs. CB4 9LQ

Tel: 01223 713900

The Regional Assembly

The Regional Assembly is designed to be the representative voice of the region. Its members include elected councillors nominated by the region's local authorities, along with regional representatives chosen by the voluntary sector, environmental groups, faith communities, business and economic partnerships, education and cultural networks and town and parish councils.

The Assembly is part-funded by the region's local authorities and has the opportunity to draw down resources directly from central government. It has a small secretariat of administrative, policy research and communications staff and a team of planning and transport professionals. It relies on the expertise of its member organisations and regional partners.

The Assembly has responsibilities in the three key areas of advocacy, accountability and regional planning.

Advocacy - The Assembly looks to influence Central Government and European Commission policy in favour of the region that it serves by providing a voice for the region, engaging and representing member organisations and, through them, the wider public.

Accountability – EERA provides regional accountability for EEDA and is a sounding board for other government agencies.

Regional Planning - The Assembly is responsible for proposing strategic planning and transport policies to Government. They also prepare, monitor and review Regional Planning Guidance (Regional Spatial Strategy) for the region.

Website: <http://www.eera.gov.uk/>

East of England Regional Assembly

Flempton House, Flempton, Bury St Edmunds, Suffolk. IP28 6EG

Tel: 01284 728151

The National Hubs

A good starting point for looking for free information around specific areas of expertise are the hubs set up with funding from the government's ChangeUp programme, most of which have now been reabsorbed into NCVO. Many hubs organise regional training and events.

The Finance Hub - www.financehub.org.uk

The Finance Hub wants to increase voluntary and community sector access to high quality information, advice and support on funding and finance, and to use what they have learnt to influence policy and practice.

The Governance Hub - <http://www.ncvo-vol.org.uk/governanceandleadership>

NCVO's Governance and Leadership work champions, supports and enables good governance and effective leadership in the voluntary and community sector.

The ICT Hub - <http://www.ncvo-vol.org.uk/advice-support/ict>

The ICT Hub is a partnership of national voluntary and community organisations providing a range of services to help voluntary and community sector organisations benefit from ICT.

The Performance Hub - www.performancehub.org.uk

The Performance Hub works to help third sector organisations (charities, voluntary organisations, community groups and social enterprises) to achieve more.

Volunteering England - www.volunteering.org.uk

Volunteering England's mission is to support an increase in the quality, quantity, impact and accessibility of volunteering throughout England.

UK Workforce Hub - www.ncvo-vol.org.uk/advice-support/workforce-development

The NCVO Workforce Development team helps voluntary and community organisations make the best of their paid staff, volunteers and trustees through: learning and skills, human resources and employment practice, leadership, and working and volunteering in the voluntary sector.

Skills Third Sector - www.skills-thirdsector.org.uk

Skills – Third Sector makes it easier for people in charities and social enterprises to have the right skills to make a difference to people and their communities.

Funder - mental 2

Ten tips for..... Avoiding the funder's recycle bin

1 Ring before you write

Before you put pen to paper, ring the funder for a brief chat about the suitability of your application. Some, like the Nationwide Foundation, insist on it.

2 Are you eligible?

Check you meet the funder's rules on eligibility. If they only support charities and you are not one, don't apply!

3 Is the timing right?

If you are planning to change your status e.g. to become a charity, the Community Fund advises you to apply to them after the change.

4 Don't do the council's work

Check that the service you intend to provide is not covered by statutory provision. A (non- governmental) funder is unlikely to support this work.

5 Answer the question

Fill in all the boxes on the application form, unless the form states an answer is optional. If a box is not applicable, say so. And send all the supporting documents the funder asks for (but no more).

6 Are you responsible?

Show you can be trusted with money through past experience, the financial control mechanisms in place, and by providing realistic costings.

7 What's the plan?

Your application needs to show evidence of planning. Does your project have realistic targets or benefits?

8 Timescales?

Give funders enough time to consider your application before your planned project start date. Most won't fund retrospectively.

9 Do it yourself

Involve beneficiaries or local people in designing the project and writing the application. Funders may reject an application if they suspect it has been written by a 'support worker' from another organisation.

10 Does it make sense?

Get someone who knows nothing about your project to read your draft application before submitting the final version.

Generic Model for Projects Seeking Funding

This model is particularly relevant for applications seeking relatively large sums of money for relatively sophisticated projects. We are not suggesting that this is a magic formula for every, and any, application but we do think that the principals outlined here will help a range of applications to a range of funders.

The model is predicated on the idea that across a range of funders and funding programmes there are six main inter-linked components to any strong application for funding.

The purpose of the model is to help applicants and their advisers to move away from concentrating on application forms as an initial planning tool and to think instead about project planning in a wider sense. Most funding application forms are not designed as project planning tools, instead they are designed to capture information to help funders with their assessment processes.

Funders advise that organisations who project plan in detail before filling in funding application forms find that the overall application process is significantly less onerous. It must be stressed that although we demonstrate this model over six separate steps no one step is more important than any other and they are all interlinked.

1 Beneficiaries

Beneficiaries are all of the people who will benefit from the services or activities offered by the project seeking funding.

The first component of our generic model is a clear understanding and explanation of who will benefit from the project. What sort of people are they? Where do they live? What are their particular needs / requirements? What are the specific issues that the project seeks to address?



Example: Let us take the example of an older people's befriending scheme that seeks to help older people to live independently in the community.

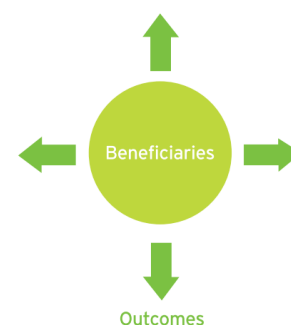
In this case the beneficiaries might be identified as older people, many of whom live alone, are in poor health or housebound, and are scattered over a fairly large geographic area made up of small rural communities.

2 Outcomes

The second component is a clear understanding and explanation of the differences that the project can make to the lives of the beneficiaries. Many funders call these differences outcomes.

It is these outcomes which are often the main routes to funding rather than the particular needs and disadvantages of the beneficiaries. It is generally not enough to be able to clearly identify the disadvantages that a particular community faces. You are more likely to secure funding for projects that are really clear about the positive differences that they can make to people's lives.

As part of project planning we suggest that applicants and their advisers take time out to consider precisely what they hope to achieve on behalf of their clients.



Think about the clients before they access the service. Who are they? What issues do they need help to address? How can this be done? How are the clients after they have accessed the service? What has been achieved with them or on their behalf?

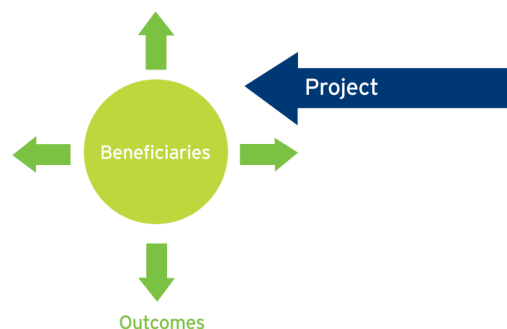
Example: Older people are less socially isolated, have an improved sense of wellbeing, are less lonely, less anxious and less vulnerable to and anxious about crime. It might also include an improved rate of take up of social security benefits amongst older people, and improved referrals to other appropriate organisations and projects including GP's and social services.

3 The Project

The project should consist of a series of planned steps and activities which will lead to delivering the proposed outcomes for the beneficiaries.

Questions to consider include:

- How will we make this project accessible to the people who really need it? What steps need to be put in place to ensure that the project makes the positive difference to people's lives that the project is aiming for?
- What resources are needed in order to ensure that the project can deliver its outcomes? How many people is the project going to help?



Example: In the case of our older peoples befriending scheme, let us suggest that the applicant has identified 300 older people who could benefit from this project. Given the geographic spread of the beneficiaries they might decide that they need two staff to be able to offer these services.

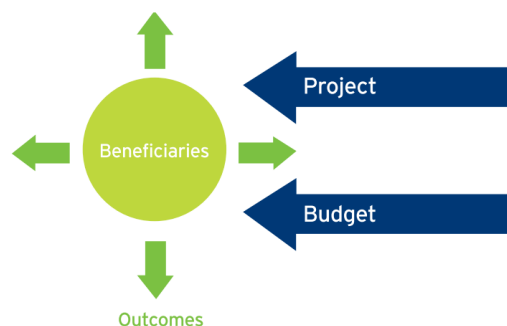
They might also conclude that it is important both that the service can visit people in their own homes but also that it can bring isolated older people together in one or more settings to share social events. The organisation will need to consider how it will promote the project, firstly to encourage existing potential beneficiaries to engage and secondly to bring on new beneficiaries as the project progresses.

The organisation might consider how it will work in partnership with GP's, the police, the Department of Work and Pensions, local authority services and other existing providers of services for older people.

4 Budget

The project will have costs associated with the activities and resources targeted towards delivering the outcomes for the beneficiaries.

These include the cost of salaries for staff working on the project, travel costs, publicity, training, room hire, telephones, computers etc.

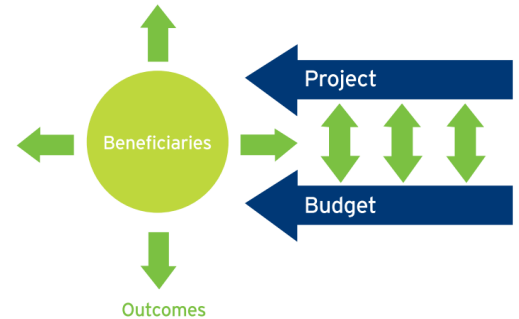


Example: In the case of our older peoples befriending scheme, there will be significant travel costs both for the staff and the beneficiaries. The applicant will need to plan the number of journeys it expects its staff to undertake, and to cost this.

It needs to think carefully about how it will bring older people together, the transport required, room hire, refreshments and entertainment, and to cost this too. There will be costs associated with promoting the project, initially and on an ongoing basis. What needs to be done, for instance, to maintain the profile of the project amongst the areas GP's? How much will this cost?

In a well planned project, funders will be able to see clearly how the costs link to the proposed activities that make up the project, and the resources required to deliver the desired outcomes for the beneficiaries.

Funders want to be sure that applicants have asked for sufficient money to deliver the outcomes they are aiming for and that the project is value for money.



5 Organisation

The fifth component is the organisation itself.

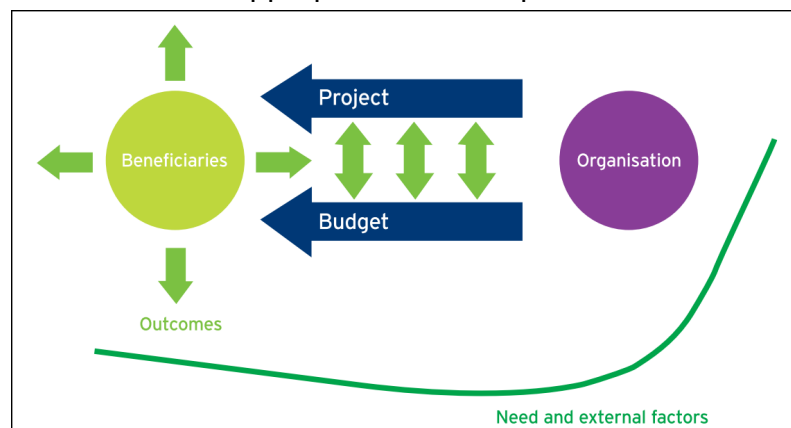
Funders want to make awards to organisations that are sufficiently well managed to deliver the project and the outcomes associated with it. Some of the questions that funders will ask are: Is the organisation sufficiently financially stable to deliver a project of this size over this time period? Are the management and / or trustees sufficiently experienced to manage this project? Does the organisation have appropriate policies and procedures to manage a project of this nature?

Overall, are funders going to be convinced that this is the right organisation to deliver this project, at this cost?

6 Needs and external factors

The final piece of the jigsaw is evidence of need for the project and any other external factors which may need to be taken into account. The types of evidence required will vary enormously from one project to another.

Need covers two principal issues: Firstly, the need for the project itself – are there enough potential clients to merit the project? Are any other similar projects already available? Secondly, the specific needs of the client group – is this project configured to meet clients' needs in the most appropriate manner possible?



Funder - mental 3

Ten tips for Writing funder-friendly applications

1 It's good to talk

If you're unsure about anything on the application form, call the funder. It could save you both a lot of time.

2 Read the writing

If you're asked to write answers in black ink, don't use blue. Black is requested to make photocopying of applications easier.

3 Type your answers if you can

This may mean physically cutting and pasting text. Use a font size of at least 12 point. If you have to handwrite, make sure it's legible.

4 Help the reader

Write clear and concise answers to questions. Explain acronyms and abbreviations used and avoid jargon. Use bullet points, bold or underline to highlight helpfully.

5 Contain yourself

Make your application as 'self-contained' as possible. Don't add lots of additional sheets of information unless asked to do so. If you continue an answer on an extra sheet, mark the relevant question number by it.

6 Answer all parts of the question

If a question asks a number of things, address each one under sub-headings (ideally the same as in the question).

7 Figure work counts!

Make sure your figures add up (literally!) and that they are consistent throughout the whole application. For example, if you change a figure that re-appears elsewhere ensure both are the same.

8 On the record

Keep a record of how you arrived at the figures (budget, output targets etc) even if you're not asked to explain this in your application.

9 Don't worry about repeating yourself

Some answers will overlap with others. If you can't answer a question, don't leave it blank; phone the funder for guidance.

10 Be on time

Make sure you meet the funder's deadline – late applications don't get funded!

Confessions of a GRANTfinder

GRANTfinder is a database of over 4,000 funding streams ranging from the Lottery, Europe, the Home Office to Marks & Spencer. It is a subscription based service and is available via the Internet and by CD-rom. GRANTfinder loaded onto a laptop makes it an ideal tool with which to engage with voluntary and community groups.

It produces a report as a word document which provides information about the selected funders, their criteria and contact details including live url's to their websites. There are a number of grants databases available most of which I've tried at one time or another, yet I always go back to GRANTfinder – why?

I see there being two parts to GRANTfinder - product and process. The product part is the 120 page report which comes out at the end of the process which can be e-mailed, printed out or saved to disk or hard-drive. Much more importantly from my perspective is the process of arriving at that report.

The best way to use GRANTfinder is to create a project profile, where the user inputs information about their project including location, funding required, status of applicant – registered charity or community group and type of project – young people, community safety, health etc.

Having created their profile Grantfinder then produces a list of appropriate funders. Each funder has their own word document, their details can be displayed as a summary document – one page of A4 with contact details web links and a short profile of the funder or a more detailed document (nine pages for Awards For All).

This is where the laborious but nevertheless valuable part begins. By taking the applicant through this list (1 –1.5 hours), they get an understanding of the organisations the funders support, their target groups and the range of activities they encourage. This usually raises a number of issues for the applicant, which allows them to examine their structure (most funders only support registered charities for example), their target groups (do they only work with children – or with parents as well?), their activities (most groups do a lot more than they think they do).

A typical (true) example: A playgroup enquires about funding for new toys, while going through Grantfinder it realises it actually does a lot more than zoo keep other peoples children. It helps develop social interaction between children, it improves their communication skills, it promotes healthy eating, it encourages learning and self-confidence.

As well as working with the children the playgroup works with the parents, they learn life-skills, parenting skills, there are volunteering opportunities, mentoring, peer support and learning opportunities. There are a number of funders who will fund these activities GRANTfinder identifies the most appropriate.

As a Local Authority Officer for Stevenage Borough Council, I see GRANTfinder as an invaluable means with which to both engage with and support voluntary organisations within my Borough. GRANTfinder is different (more focussed) to Funder Finder as used by the local CVS and provides a complimentary rather than a competing service as I get clients referred to me by them sometimes for the same project!

John Pye, Stevenage Borough Council

Just to address the balance, Funder Finder is frequently used by CVS's when advising groups. The ideal situation would be to be friendly to whoever it is in your area that has the opposite funding programme and make the best of both worlds.

Introductory Pack on Funding and Finance for VCO's

Six guides on: sustainable funding; financial management; fundraising; trading; procurement; loans. Each contains case studies, tools and signposts to other resources. Commissioned by the Finance Hub from the NCVO's Sustainable Funding Project. Free to download from www.ncvo-vol.org.uk/sfp.

Funder - mental 4

Ten tips for... Getting support from businesses

Most organisations approaching businesses for support are asking for money (sponsorship, donations, or gifts in kind), time (employees for volunteering or fundraising), expertise (secondments or free access to professional services). As with conventional fundraising, long-term success almost always depends on detailed research and careful relationship - building.

1 What's the connection?

It helps if there's a link between your work and a company's products and services.

2 First impressions count

Research thoroughly, produce high quality corporate literature and re-work the materials as necessary for different companies. When you finally meet face-to-face with the company, dress to impress!

3 Don't beg, talk business!

Ask yourself 'what's in it for the company?' Possible benefits include improving the company's image; motivating their employees; learn more about customers.

4 Involving employees

Think how employees might build team spirit, develop skills, and reduce stress in their workplace by volunteering with your organisation.

5 What have you got?

Think what expertise you can offer in return for support. Might your service users be a focus group for giving feedback on their products?

6 Keep it clear

Structure your 'case for support' carefully. Don't get bogged down in detail in the early stages. Learn each company's language (look at their annual reports, websites and other publicity materials) and tailor your proposal accordingly.

7 Cost it properly

As with all budgets, make sure your figures are as accurate as possible and always be honest. Be clear about how much you're asking for.

8 Can you commit?

Working with companies should be a long term commitment. Have you the time for this? Remember the company is effectively buying from you.

9 Talk to the right person

As with other forms of fundraising, 'who you know' is often as important as 'what you know'. Personal links between your staff, volunteers and trustees and businesses can open doors!

10 Get advice

Business in the Community (www.bitc.org.uk) organise events, partnership programmes, and offer guidance notes.

The NCVO's Sustainable Funding Project website (www.ncvo-vol.org.uk/sfp) has a guide on 'Corporate Support'. The UK Guide to Company Giving (book and CD-ROM) from the Directory of Social Change (www.dsc.org.uk/Publications/Fundraisingsources) is also worth a look.

And it doesn't get much better than this.....

On Wednesday 28 June 2006 we held the Inaugural Meeting of Funding East at Ickworth Hall, near Bury St Edmunds. Over eighty funders and funding advisers attended and we asked them to jot on post-its a piece of advice for new funding advisers. We present these words of wisdom to you now, and we hope that you find them useful.

Richard Weller

Equipping yourself:

- Network - make lots of good contacts quickly and establish yourself in your area
- Trawl websites to get 'up to speed' on funding issues
- Investigate and 'sign up' for relevant training opportunities as soon as possible
- Go to seminars and arrange meetings with local and national funding bodies
- Understand full cost recovery and encourage groups to budget accordingly.

Getting support:

- Find out who else in your area is doing a similar job – talk to them and find out how you can work together.
- Find a local mentor
- Make sure you link up with your local Community Foundation
- Get out and meet funders and other funding advice workers
- Don't forget your local authority

Working with groups:

- Find out what groups want before you meet them the first time. It gives you time to prepare!

- Never view funding for organisations in isolation – link to wider organisational issues
- Use approaches that have been successful when working with organisations that are similar to the one you are advising
- If you don't know an answer admit it, and get back to them later
- Follow up on the advice you've given if the organisation/ group/ individual does not contact you with feedback/results of their actions
- Advise organisations to try to have many different conversations before they try to define their project aims etc
- Be realistic – do not build up hopes too much!
- Try to meet more than one member of the organisation you're advising (preferably separately) to get a rounded view
- Arrange your first meeting with the group at their premises – it's a good guide to their capacity to take advice (and do anything with it!)
- Use the services of other organisations e.g. signpost CVS, ACRE and RCC's.

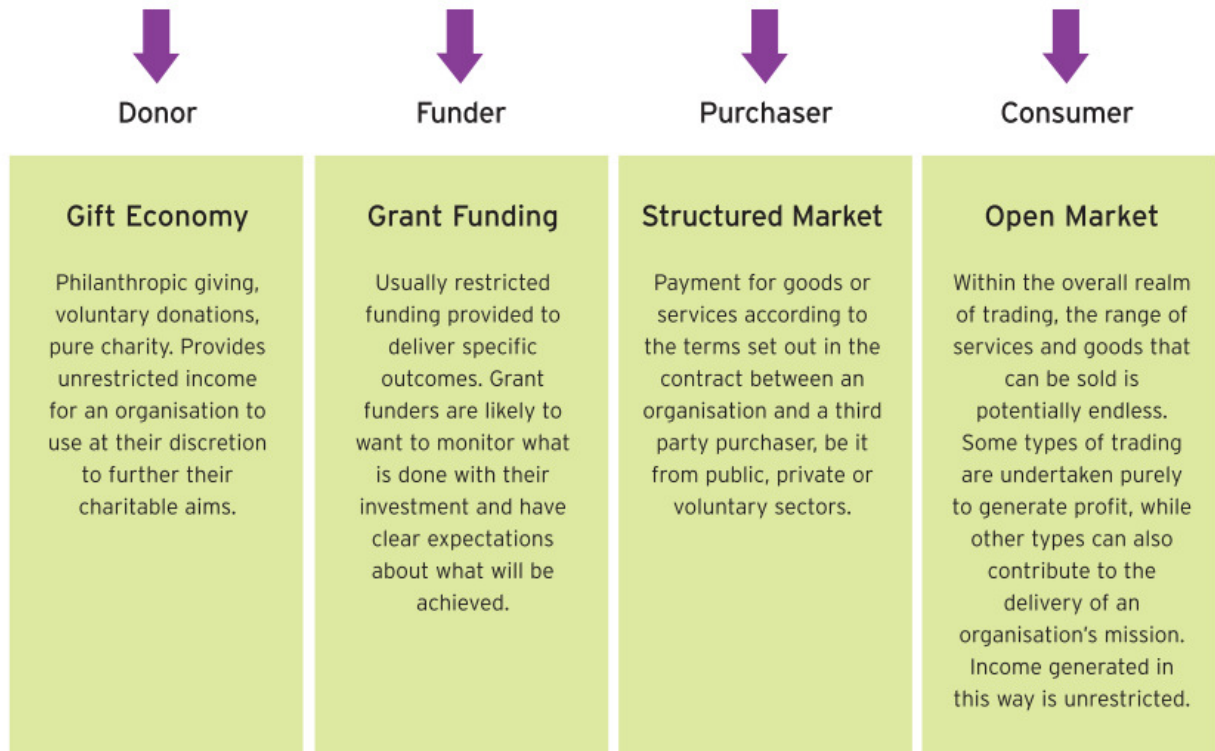
Remember

- Be patient, projects and building funding partnerships can take a long time
- Assume that things change!
- Be patient!

Sustainable Funding: Across the Income Spectrum

Income options available to voluntary and community organisations

(Source: NCVO Sustainable Funding Project (www.ncvo-vol.org.uk/sfp))



Sustainable funding can involve all of these income streams, or a more limited range - diversification across, or within, the spectrum



Document History

This booklet was originally produced by Siobhan Branagh, Development Officer, East Cambs CVS; Maxine Fiander, Development Officer, West Norfolk VCA; Chris Lee, Project Manager, Raising the Ceiling; John Pye, External Funding Officer, Stevenage Borough Council; Richard Weller, Regional Policy Adviser, Big Lottery Fund; who worked on the principle that we all need help now and again, so they drew the best of information from a wide variety of sources.

This updated issue was produced for learnEAST, for the Third Sector in East Anglia, by the Suffolk Learning Consortium (www.suffolklearningconsortium.org).

Appendix 1 - Advising Groups on Funding Issues

This course is aimed at funding advisers and development workers. It explores using funding advice as a means to empower groups, and covers:

- the role of the funding adviser and good practice issues
- diagnosing groups' needs
- clarifying the criteria of complex funders for groups unfamiliar with them
- trends in voluntary sector funding.

This practical, 4-day accredited course designed by Fit4Funding (the new name of the Charities Information Bureau) can lead to three credits at Level 2 or Level 3 with the Open College Network.

Topics and issues covered:

- Good practice in giving funding advice, including different models of funding advice
- Giving feedback on applications for funding
- Supporting groups in planning their fundraising and completing funding bids
- Diagnosing groups' needs. Barriers to accessing funding information
- Clarifying criteria of complex funders for groups unfamiliar with them
- Common problems associated with finding funding
- Why bids fail
- Information sources and Funding sources, choosing the right funders, including "when is the cost of funding too high?" and applications to small funders
- Principles of funding strategy
- Evaluating the success of your funding advice
- Trends in voluntary sector funding.

Participants should have some experience of giving funding advice to benefit fully from this 'interactive' course, which will draw on the group's own experience and knowledge. The style of the course will be informal, and participants will be encouraged to share their experiences.

No formal academic qualifications are needed, but you need to be involved in supporting voluntary and /or community groups in issues around fundraising.

There is no exam; participants will be continually assessed on work they produce individually, and on group work within the sessions.

You must participate on all four days of the course to be eligible for accreditation by the Open College Network.

Further details: from Fit4Funding (the new name of the Charities Information Bureau) tel 01924 239063, e-mail Sally.Deith@fit4funding.org.uk website www.fit4funding.org.uk
See also: Eastern Region pages at www.fit4funding.org.uk/help and advice / regional / eastern.

Appendix 3 - Funding Consultation Record Sheet

From Watford CVS

Date	
Organisation	
Representative	
Address	
Telephone	
Email	

Topics Discussed	
Action Points agreed by Organisation	
Action Points agreed by CVS	
Signed, for Organisation	
Signed, for CVS	

PLEASE TICK HERE IF TELEPHONE CONSULTATION	<input type="checkbox"/>
--	--------------------------

Please tick relevant support given :							
application bid	<input type="checkbox"/>	business planning	<input type="checkbox"/>	information	<input type="checkbox"/>	fundraising strategy	<input type="checkbox"/>
Local Network Fund	<input type="checkbox"/>	search	<input type="checkbox"/>	sustainability	<input type="checkbox"/>	funding signposting	<input type="checkbox"/>

Appendix 4 - Funding Search Form

From Watford CVS

ORGANISATION DETAILS

Organisation	
Representative	
Position	
Address	
Telephone	
Email	
Website	

Does your organisation have a constitution?	YES / NO	Does your organisation have a bank account with two signatories?	YES / NO
Are you a registered charity?			YES / NO
Who does your organisation help?			
What are your aims?			
Do you have a management structure e.g. chair, secretary, treasurer			YES / NO
If applying for over £5,000 - Do you have a project plan?			YES / NO

PROJECT DETAILS

Project Name	
Project Description	

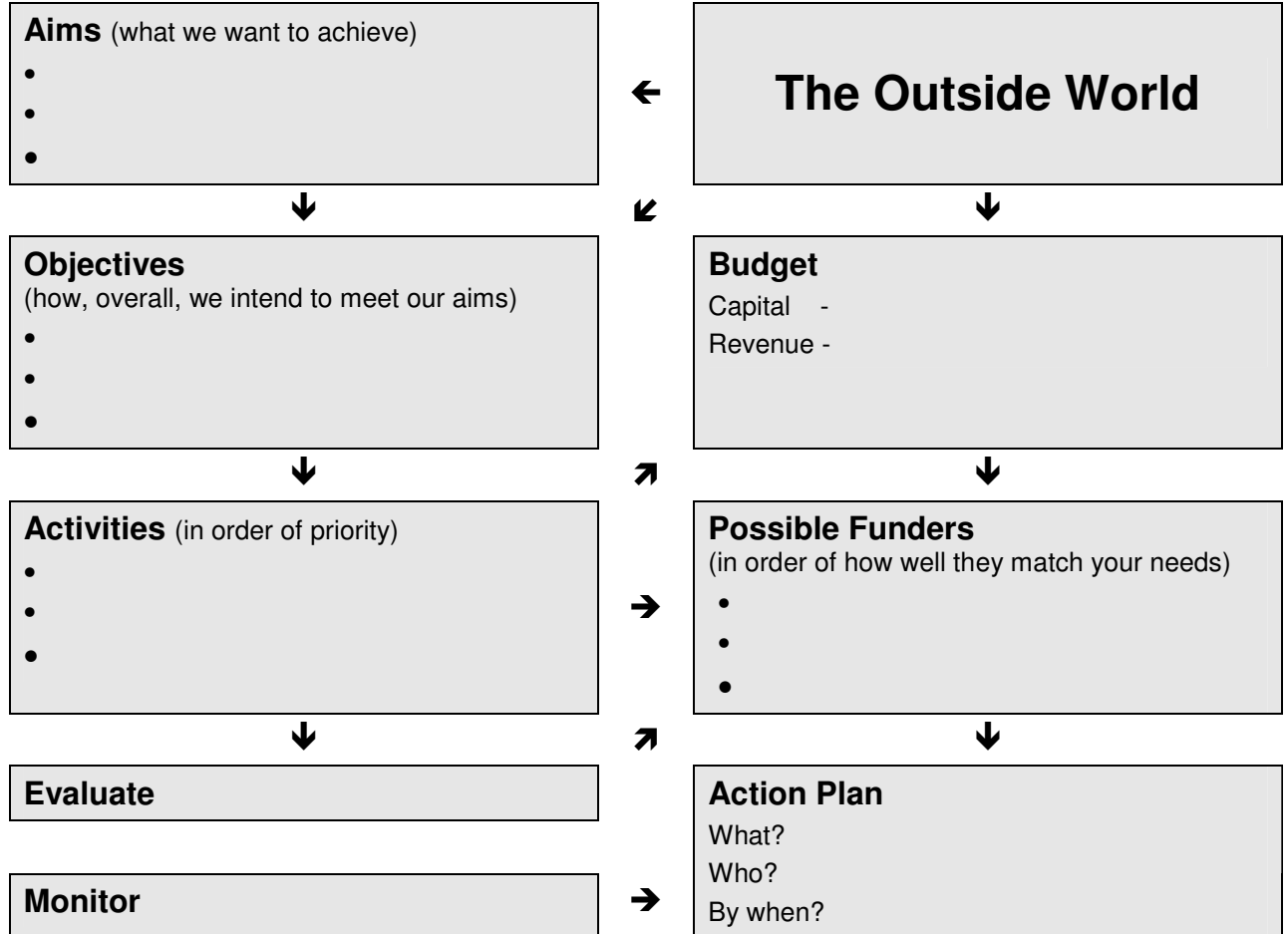
PROJECT DETAILS	
Project Location	
Project Start Date	
Does your project require planning permission?	YES / NO
If YES	APPLIED FOR / NOT APPLIED FOR
Type of project	CAPITAL / REVENUE / BOTH
Are there any future revenue implications - e.g. future maintenance costs?	YES / NO
If YES , who is going to fund them?	

FUNDING DETAILS	
Total cost of project	£
Amount of funding already secured	£
Where has this funding come from?	
How much money do you require?	£
Who has funded you in the past?	
Do you know of any funding programmes for this project?	YES / NO
If YES please specify	
Project Location	
Project Start Date	
Does your project require planning permission?	YES / NO
If YES	APPLIED FOR / NOT APPLIED FOR
Type of project	CAPITAL / REVENUE / BOTH
Are there any future revenue implications - e.g. future maintenance costs?	YES / NO
If YES , who is going to fund them?	

Signature		Date	
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Appendix 5 - Building a Funding Strategy

(Source: Fit4 Funding www.fit4funding.org.uk)



Appendix 6 - Example of Completed Funding Strategy

