

Residents' Fundraising Toolkit

1. INTRODUCTION

This simple toolkit is designed to help you consider whether fundraising could help your organisation and the different stages of the fundraising process. We have included top tips throughout to help you avoid common pitfalls and be more likely to succeed.

2. PRE- PLANNING

Before you start to think about fundraising you need to ensure that you have done all the necessary research to develop your project plan. If your project plan is clear and considered, fundraising will be a much simpler process for you.

Be clear about:

- What you are going to do
- Why you want to do it
- How have you identified the need of what you are going to do?
- How you are going to deliver the project?
- When you will do it
- Where you will do it
- Who/how many people will benefit directly or indirectly
- How you will know you have made a difference to the people or the organisations your project will benefit
- Do you have the resources as an organisation to manage the project? If not what would you need?

Appoint a Project Manager

It is almost always a good idea to appoint someone as project manager. Their role will be to co-ordinate the project and ensure that everyone knows what they are supposed to be doing and when.

Make sure you and your colleagues:

- Are clear as to their role within the project
- Are clear as to who is co-ordinating the project and the funding applications
- Are aware that if certain tasks need to be delegated, this is the project manager's responsibility. Be certain this is done before the planning process gets underway, as this could slow things down and waste time.

4. SELECTING FUNDERS

Plan Ahead

Spotting possible funding streams as early as possible is vital to ensure you have enough time to write a good application. If you can allow yourself plenty of time, be careful that this does not slip down the list of priorities. Poorly researched or quickly written applications are rarely successful and can reflect badly on the organisation which submitted them. One good way of reminding yourself of deadlines is to set up reminders on your diary system. Also involve others who will be expected to contribute usefully to the application. Brainstorm your proposals with colleagues and friends.

When you have a clear view of what your project is seeking to achieve you can then look at potential funders. Being clear about what you are trying to do will make it easier to run searches. If you are not sure about whether your project fits a funder's criteria contact them and ask their view.

Understanding what funders want

When it comes to making an application for money, different funders require different kinds of information. If you have been running a project or organisation for some time, you probably know what is needed and the difference that this will make, but remember that funders will be looking for you to demonstrate this on paper, and will usually not know anything about your organisation.

Follow the Guidelines

Once you identified the funding agency that is your primary target, read the funding stream guidelines more than once. Make sure you are eligible and meet all requirements e.g.

- Is your group / organisation eligible?
- Can the funds be used for your project
- Is there a list of exclusions;
- Do you have to be a registered charity?

How much money or resource do you need?

Your budget for the work you want funded needs to be as accurate and comprehensive as possible.

Remember to:

- Be realistic about how much things cost
- Budget for planning, monitoring and evaluation
- Make sure you have systems in place for monitoring and reporting on spending
- Remember to include running costs (such as premises, stationery, management)
- Show in-kind support and match funding
- Check the terms and conditions of the grant before accepting funding;
- Be realistic about what you can deliver
- Keep in regular contact with your funder – and always alert them to any problem as soon as possible.

5. MAKING YOUR CASE

Getting and Using Facts and Figures

It will always be helpful to be able to illustrate the strength of your case by using facts and figures rather than making generalised statements. Many funders now require hard information rather than your opinions. A couple of choice facts can be far more effective than two paragraphs of argument.

Understanding outputs and outcomes

Some funders will ask you to demonstrate the difference your project will make by stating outputs and outcomes. This can be quite confusing if you are new to fundraising, so here is a quick explanation:

Outputs:	Outcomes
<p>The <i>quantitative</i> results of the project. Outputs are figures that can be monitored throughout the project</p> <p>For example:</p> <ul style="list-style-type: none"> • 50 children attending the study support session each week • 20 women benefiting from IT training 	<p>The qualitative changes/results that the project will have. They should reflect the project's aims</p> <p>For example:</p> <ul style="list-style-type: none"> • Increased confidence of members • Increased awareness of employment and training opportunities

If your outputs are quite low for a reason, always explain this. For example it may be that you are delivering a project to people with high needs which mean that your project can only work with a limited number of people at once.

Top Tips:

- Be clear on who will benefit
- Explain how will you evaluate
- Remember to be realistic about what you can achieve! There is no point setting up to fail and funders will usually prefer to see realistic and achievable outputs.

Exit Strategy

An exit strategy is something many who apply for funding put less emphasis on than for example how success will be evidenced. This is a common mistake and the presence of even an outline exit strategy is essential in most funding applications. It would however; be better to at least include an outline of an exit strategy which spells out various scenarios based on levels of success and an expectation of how the project activities can be continued after the initial funding period.

Use positive language

Good applications usually tend to come from organisations that believe in what they do and enthuse about their achievements and success.

When completing the form or letter ensure you use key 'buzzwords' from the guidelines in the application, where you can, be positive and use confident action oriented words like: 'increase', 'maximise', 'save', 'assist', 'decrease' and avoid using words like: 'would', 'could', 'should' and 'may'. Keep your application focussed, by being very clear about the vision, aims and objectives and keep what you say clear, concise and above all convincing.

6. DEALING WITH A FUNDER'S RESPONSE

Completing the application and sending it off to a funder is not the end of the process, whether or not you are successful.

If you *are* successful:

- Thank the funding organisation and keep in close contact during the course of the project
- Make sure you meet their monitoring and evaluation procedures;
- Invite the funding organisation to any open days or events you may have especially those related to the funded project
- Keep in regular contact with the funder to maintain the relationship.

If you are unsuccessful this time:

- If your application is rejected but no explanation is given, contact the organisation you applied to for feedback

- Use this feedback positively to identify weakness in your application/project so that these can be turned into strengths
- Don't give up! Many funding organisations often receive more grant applications than they can fund. It is not unusual to have a grant application rejected so keep trying.

7. EVALUATION

Ways of evaluating your project

Once you have collected information by monitoring the work, you can begin to evaluate by asking yourselves the following questions:

- Did we meet our goals?
- If the goals were not achieved, why is this?
- What did we do well?
- What could we have improved?

Remember though, you may also achieve some useful things you did not set out to achieve! Other useful general questions to consider are:

- Are there any unexpected positive outcomes?
- Are there any unexpected negative outcomes?
- How can we learn from these?

8. SUMMARY

Do's and Don'ts

Do...

- Plan ahead
- Believe in what you're doing
- Tailor your application to the funder
- Keep records of everything
- Prepare realistic / accurate budgets
- Be concise and specific
- Establish your credibility
- Develop long term partnerships
- Say thank you

Don't...

- Send a duplicate mail shot to a range of funders
- Ask for unrealistic amounts
- Assume funders will instantly understand the needs you are seeking to meet
- Make general appeals for running costs



- Use jargon
- Beg
- Make statements that are untrue.

GOOD LUCK!