

What do I need to consider when putting together an effective funding bid?

PROBLEM SOLVERS

In each issue of *Together*, we share examples of frequently asked or interesting questions that have come into our advice service since the last issue. Due to significant reductions in services during lock-down many community transport providers have lost income and are looking for ways to ensure their long-term sustainability. In this issue, [David Brooks](#) and [Michelle Clarke](#), Project Co-ordinators for CTA's [Connecting Communities in Wales project](#), look at their top tips when it comes to a community transport provider applying for funding and what to consider when putting together an effective funding bid.

Making sure that you can put together effective funding bids is an important skill, more so now than ever. Before you begin, it's worth considering if your organisation has an up-to-date fundraising strategy in place. Are you clear what you are fundraising for, how this relates to your organisation's vision and mission, the resources you will need, and possible sources of funding to explore?

While it can take some effort to develop a fundraising strategy, the time you invest will be well spent as you will have a focus for fundraising, some clear objectives, a better idea of what funding sources to explore, as well as a greater understanding of the resources required to fundraise. If you don't have a fundraising strategy then why not consider attending a training course on the topic – providers such as [ncvo.org.uk](#) (England), [wcva.org.uk](#) (Wales), and the Institute of Fundraising [institute-of-fundraising.org.uk](#) could be useful places to start looking for courses. It's also worth reading the Code of Fundraising Practice that applies to fundraising carried out by charitable organisations and third party

fundraisers which you can download from [fundraisingregulator.org.uk/code](#).

After ensuring you have a fundraising strategy in place, it is worthwhile **developing a case for support**. This document can then be tailored to suit your purpose, depending on which funder you are applying to, but the core information remains the same. In brief, your case for support could include:

- your organisation's vision, mission and values;
- its history and credibility - its 'track record';
- leadership and governance arrangements, including financial management;
- overall impact and statistics to demonstrate this impact;
- a description of the work or project you want funding for, why this is needed, how you know it is needed, and the rationale for your proposed approach;
- any partnership working, while also clearly stating that your proposed work / project will not duplicate any existing work or services;
- the resources required and timescales for the work or project;
- income and expenditure for last financial

year and budget for the coming year, clearly identifying any shortfall that you are fundraising for;

- contingency plan in case the fundraising target isn't met, such as reducing the scope and scale of the work or project, reducing the duration of the project, or other action.

Remember that funders give money to benefit people so communicate your passion for your work and show the difference it makes to beneficiaries.

As CTA staff, our contact with community transport organisations is rewarding because we can see the passion and commitment YOU have for providing a service that is so often referred to as a 'lifeline' by the people using it. When thinking about the impact of your work, consider why it is important and what would happen if your organisation didn't exist. Use quotes from staff and volunteers, feedback from people using your services, include short case studies (either written or links to video case studies) showing the impact of your services for individuals. Refresh these materials on a regular basis so that you always have a good selection of quotes, written case studies and videos as well as updated statistics about your work.

It is useful to research a prospective funder before applying – check out their website and read their annual reports / annual accounts to get a good overview of average grant size, types of grants made and the range of organisations they support. Some funders will fund a broad range of activities, both in terms of revenue and capital costs, while other funders

only fund specific activities and costs. It is important to identify the right funders for your project, and identifying no more than three different funders for a single project will allow for a targeted and strategic approach to funder identification which has a better chance of success. Make sure you are clear about the funder's priorities and values so your application or proposal can be developed to align as closely as possible with them. Look at other organisations doing similar work to yours and check their funding sources (again, through their annual report and accounts – visit gov.uk/government/organisations/charity-commission and gov.uk/government/organisations/companies-house) as sometimes you can spot a potential funder who may be willing to fund your work as well.

On the subject of annual reports and accounts, it may seem obvious but something that is often overlooked is the need to **ensure that your organisation's accounts and annual returns are filed on time** with the relevant body. Funders may check your organisation's filing history as part of establishing your track record and good governance. Late or misfiled documents can create doubts in a funder's mind – something you want to avoid at all costs.

Consider the outcomes you want to achieve through your work or project.

Instead of focusing on the extra capacity you will have within your transport projects, focus on the longer term changes your project will make to people's lives, such as: a reduction in isolation and loneliness through being able to continue daily activities; improved health and wellbeing through increased access to vital healthcare and community services; a skilled workforce through enhanced training for staff members and volunteers; and other such outcomes.

Think about how you can foster a long-term relationship with key funders.

It's a common mistake to take the money and forget to communicate with funders due to the pressing need to deliver front-line

services. Yet it can be enormously beneficial to maintain regular communication with funders. Where possible, it is a good idea to discuss your project with the potential funder before you start to fill in an application. A discussion can help to identify if your project is something that the funder believes has a good chance of being funded or if your organisation is eligible to apply, for example. A conversation with a potential funder before you apply can save a lot of time. Additionally, if you are already in possession of a grant, alongside your monitoring returns, you could send occasional updates on successes, invite them to any official openings or launch of new vehicles and services, and send them your annual report. If you're not sure whether they would welcome this additional contact, ask them!

Many funders don't always fund transport. However, **funders may consider transport as an add-on to enable projects to take place** e.g. reducing loneliness and isolation through supporting people to get to a lunch club or community center for example. Some funders recognise the importance of community transport and have long supported the CT sector. The Big Lottery Fund, for example, has invested in CT over many years across all of their programmes.

Funders usually like to see in applications for funding how you have gone about **demonstrating the need for your project and how you have consulted with beneficiaries, stakeholders and the community**. Undertaking questionnaires,



focus groups, community meetings and surveys are all techniques which can be used to demonstrate a bottom-up approach which properly evidences community need. It would be good practice to detail in your application, for example, what type of consultation methods took place, on what date, the number of people who took part or attended and what the main outcomes were of this consultation.

Getting your message across

There's no exact science to submitting the perfect funding bid, but these tips should help you get your message across in the most effective way. We all know how important and worthy of support the work you do is, and we want your funders and potential funders to know the same thing.

David and Michelle are Project co-ordinators for CTA's Connecting Communities in Wales project, which has received funding through the Welsh Government Rural Communities - Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development and the Welsh Government.

As part of their role with the project they have worked with numerous community transport providers across Wales to put together funding bids for new projects and schemes. To date, the project has supported members in Wales to receive almost £1.8 million in funding.