



What to consider before approaching a funder

Connecting Communities in Wales Project



Why take time to prepare?

- Fundraising takes **considerable time and effort**, and there are certain things you can do to make sure that your fundraising efforts are focused towards funders which match your organisation's aims and priorities
- This presentation focuses on simple tips to **get the best out of any approach** to a potential funder



Key areas to consider

Plan ahead

Preparing for fundraising

Getting the paperwork ready

Finding a good match with a potential funder

Read the funding criteria / guidelines thoroughly

Contact with grant officers



Plan ahead

Preliminary questions to ask any organisation before putting pen to paper and writing a funding application:

- Have they got a **track record** e.g. 3 years' history? If not, can still apply for some grants with the correct legal set up, such as incorporated organisation
- Have they **filed their accounts** on time?
- Do they have **capacity** to apply for funding, deal with funders' enquiries and prepare monitoring returns?
- Have they got a **clear timeline for fundraising**: small grants can take 3 months/large grants 6 -9 months



Preparing for fundraising

Does the organisation have a **project proposal** ready?

- What do they want to do?
- How much will it cost?
- Why is the project needed?
- Why is the organisation best placed to deliver the work?
- How will beneficiaries be involved in developing and delivering the project?
- What difference will it make to people's lives / what change will happen as a result of the project?
- Does the organisation have any funds it can put towards a project? Even a small contribution may be looked on favourably by funders as it shows commitment.



Getting the paperwork ready

Does the organisation have **key documents** in place?

- Constitution
- Fundraising Strategy and Case for Support
- Health and Safety Policy / risk assessments
- Safeguarding Policy (vulnerable adults / children)
- Public Liability and Employer Liability Insurance
- Equal Opportunities Policy
- Volunteering Policy
- Annual Report & Accounts / management accounts
- Recent Bank Statement



Finding a good match with a funder

How closely aligned are the organisational aims with the funder's mission and general priority areas?

What activities does the funder prefer to fund? What groups / communities does it support?

Things to consider

What kinds of benefits does the funder want grants to have? For e.g. improved health, upskilling?

How can the organisation's project help the funder achieve their funding programme aims?

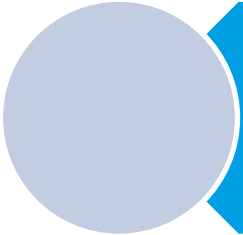


Read the funding criteria / guidelines

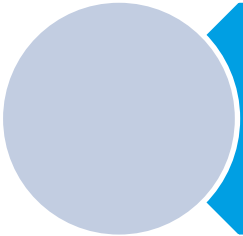
- Avoid wasting time and **read any eligibility criteria and funding guidelines carefully**. Double-check you're reading the latest guidelines as they are often updated
- There may be **simple criteria** that exclude the organisation e.g. geographical areas, organisational income threshold
- Guidelines often offer **helpful tips** on what to include so an application stands the best chance of success. Focus on what makes a potential relationship between project and funder **'mutually beneficial'**.



Read the funding criteria / guidelines



Check if the application is a **1-stage or 2-stage approach** and how it works, and likely timespan between stages.



Check what **supplementary information** they want including with the application – do they have their own template for an organisational details cover sheet?



Check their **website / annual reports** for details of typical grants and grant size – what's a realistic 'ask'. Can you ask for capital and / or revenue costs?



Contact with grant officers

- Some funders request no contact' while others state that you have to ring them to discuss project proposals – **check!**
- If a phone call is required, ensure the person calling is **fully briefed** on main points to convey / achievements to highlight / how to reinforce the 'good match' with the funder's programme
- The grant officer may represent your application at panel so ensure they have a **positive view of the project** (and the organisation as a whole)



Contact with grant officers

- Grant officers often have their own tight deadlines to meet – if they ask for additional information, **respond quickly**. This also helps create the impression of an efficient organisation.
- If there's something **significant to report** (such as the organisation winning an award or securing significant funding from another source) then let the grant officer know with a courtesy call.



How we can help

- **Working with you to develop project ideas** for community transport
- **Funding advice and templates** – the CCIW Project has supported groups to bring in almost £2million so far, ranging from £3,000 to £500,000.
- **Good governance** – performance standards, advice and information related to community transport

