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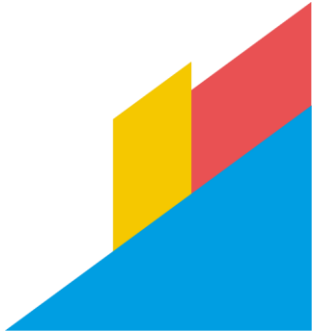
Steps to Successful Fundraising

England Conference May 2023

Michelle Clarke, Wales Transport Strategy Lead



@CTAUK1

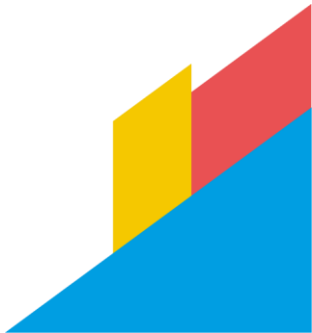


Steps to Successful Fundraising

Before applying for funding, take time to plan before you do anything else.

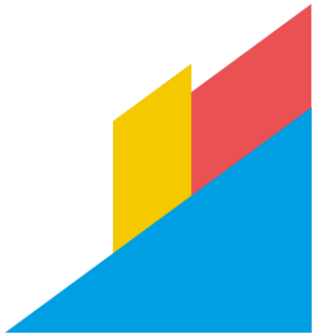
Spending some time thinking about how to get the best return on your efforts means you are more likely to take a focused approach and increase the likelihood of fundraising success.

Being aware of the fundraising cycle can help when considering the different steps involved and can help you direct attention at each of the steps in turn.



Steps to Successful Fundraising

- Fundraising Cycle
- Fundraising Strategy
- Case for support
- Housekeeping
- Show your impact
- Searching for funding

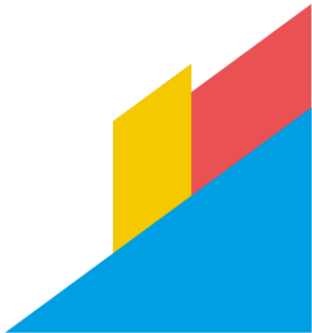


Steps to Successful Fundraising

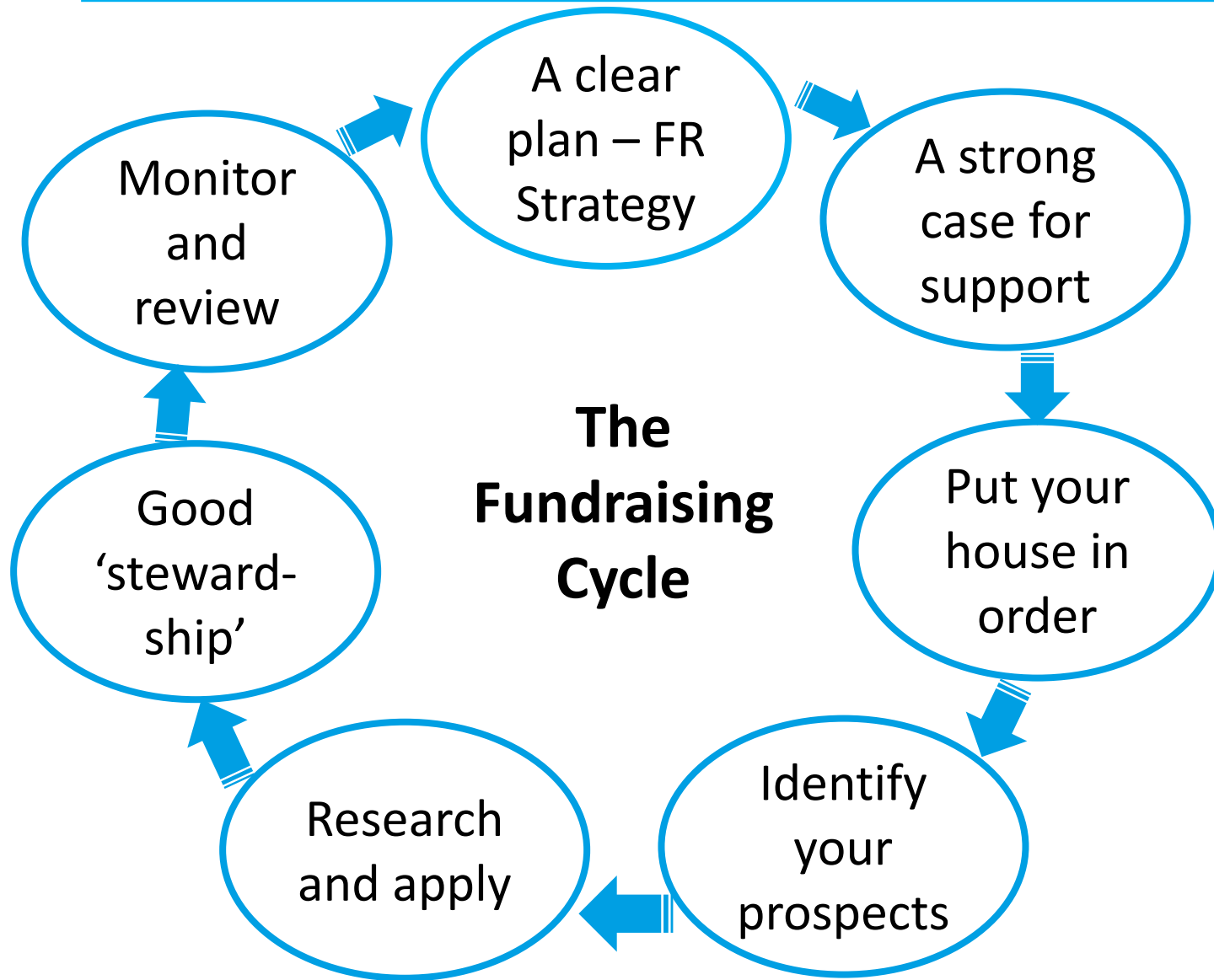
The Fundraising Cycle is...

- a circular process – what you learn as you move through each step can be fed back into the process when you start it afresh
- an opportunity to think through what you need funding for and where best to find it – having a clear focus saves wasting time and effort
- a chance to think about how you will build in sufficient time and effort for funder stewardship when you do secure funding

Takeaway: the more time and effort that is put into Fundraising, the greater the returns.



Steps to Successful Fundraising



Overall focus on

- making the **best use of resources**
- increasing / **diversifying funding**
- **proactive approach** to fundraising



Steps to Successful Fundraising

Developing a Fundraising Strategy

Why do you need one?

It's a **roadmap which asks three key questions**



- where are we now?
- where do we want to be? and
- how are we going to get there?

Without a strategy your fundraising could possibly be undirected and ineffective or you might find the kind of funding you've secured does not support the type of activities you're planning.

Thinking strategically about income generation: 3 key documents

1. Your **Accounts** – answers 'where has our income come from in the past?'
2. Your **Business or Strategic Plan** – answers 'what do we plan to do in the future?'
3. Your **Budget** – answers 'how much will it cost to do it all?'



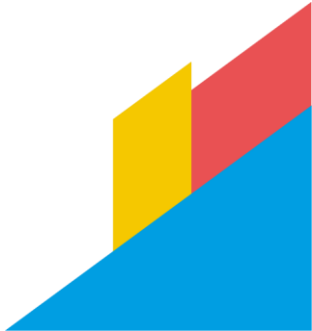
Steps to Successful Fundraising



Content of a Fundraising Strategy

Needs to be **appropriate** to the nature of your charity **and proportionate** to its size, and could include the following:

- Introduction
- Analysis of your fundraising history
- How much you need to raise and for what purpose
- Funding already in place
- SWOT analysis of your funding situation
- Analysis of potential income streams
- Resources required to support fundraising activity
- Action Plan for Year 1 with review points



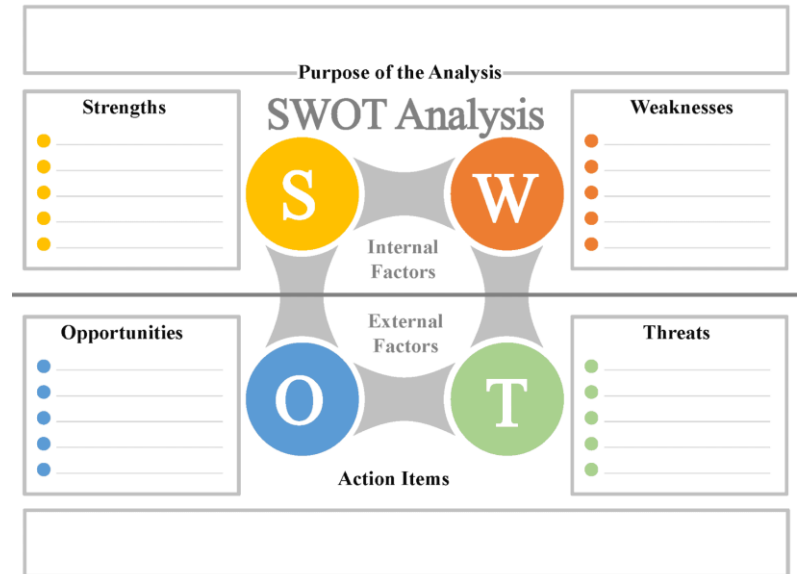
Steps to Successful Fundraising

SWOT analysis

Think about internal and external factors that affect your fundraising

Internal factors: focus on what you can enhance further or strengthen / change

External factors: how can you take advantage of opportunities on the horizon? How can you mitigate any external threats or risks?



What does your SWOT analysis look like?

Steps to Successful Fundraising

Strengths

Track record
Community 'buy-in'
Funder loyalty
Fundraising experience

Weaknesses

Lack of staff time / capacity
New to Trust FR or tendering
'Shopfront' website outdated
Limited unrestricted income

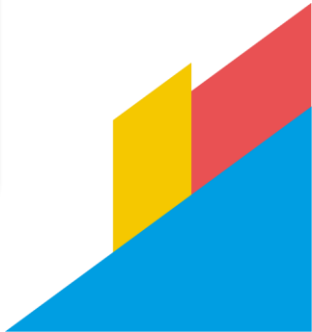
Example SWOT
analysis

Opportunities

Partnerships / collaborations
Importance of CT to policy areas
Health Transport, demographics
Integrated transport policy

Threats

Legislative framework
Cost of living crisis
(volunteers, fuel, utilities)
Competition



Steps to Successful Fundraising

Case for Support

“A strong and emotive case for support is one of the most powerful tools you can have as a fundraiser.”

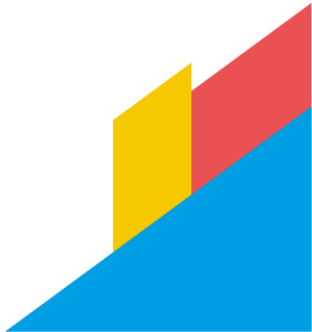
Chartered Institute of Fundraising

An effective case for support answers the question: **why should a funder support your work / organisation / project?**

3 main elements

1. What's the **need** for your work?
2. What **activities** will you do?
3. What **difference** will you make?

Use the case for support in consistent comms messaging (for e.g. website and social media content) as well as funding applications.



Steps to Successful Fundraising

Need

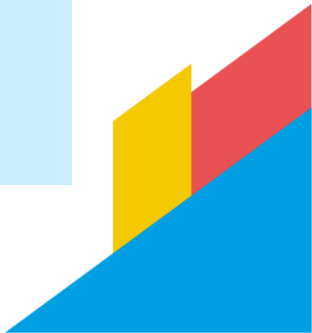
- Why your organisation exists in the first place
- What motivates and drives your work?
- Aim to connect people to your work on an emotional level

Activities

- What you do, setting your work in context within your community
- How you work alongside other organisations
- Aim to instil trust and show how effective you are

Difference

- Focus outwards not inwards i.e. on the impact your services have
- Relate the difference you make to your mission, vision and aims
- State the difference clearly and give positive examples



Steps to Successful Fundraising


For example:

Need **Loneliness is as damaging to health** as smoking 15 cigarettes a day. It can result in stress, anxiety, depression, and heart disease. The simple act of getting out, meeting up with family and friends, being able to join in wellbeing sessions or attend social activities, can seem insurmountable for people without access to transport. The longer people remain isolated at home, the more profound the impact on their physical and mental health.

Activities A2B CT brings people together, using our accessible and affordable door to door transport services to help people connect on **our shopping trips, days out, meals together, telephone befriending service** and the day-to-day reassurance and friendly support provided by our trained drivers and volunteers.

Difference Over the past 12 months, we've **supported over 300 people to get out** on a regular basis, with **88% reporting that they feel less isolated as a result.**

One of our passengers, who is in his 90s, said: *"I don't know what I'd do without your service. I wouldn't have anyone to talk to and I'd never go out. It's a lifeline."*



Steps to Successful Fundraising

Before applying for funding, it's useful to do a quick housekeeping check



- ? Are there any red flags in your Annual Report and Accounts, for e.g. a very low or very high level of reserves?
- ? Has there been any late filing of accounts with regulators such as the Charity Commission over the past few years?
- ? Are all policies and training records up-to-date e.g. safeguarding?
- ? Does your organisation have robust governance / great level of trustee skills and leadership expertise?
- ? Have any previous contracts ended early?

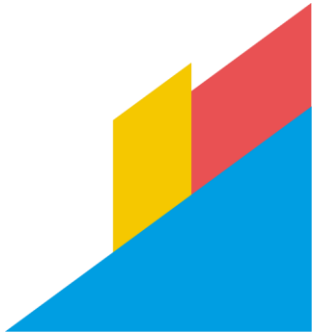


Steps to successful fundraising

Housekeeping - address the following in applications

Firstly, if you identified any red flags, then it's good to address them in your application e.g. 'Our Accounts were filed 11 days late in 2022 due to.....' Be factual and provide reassurance that any issues have been addressed. More generally:

- Say how your application meets the grant **criteria**
- Explain how your project matches the grant programme or **funder's aims**
- Ensure your project is specific and **clearly described**
- Highlight the **impact** that your work has
- Address any risk factors to show your project is **low risk**
- Emphasise the community buy-in and how you **work in partnership**
- Describe how the **user-voice** is heard at different levels of the organisation
- Refer to your organisation's excellent governance and **leadership**
- Remember that your **track record** needs to be well described



Steps to successful fundraising

Show your impact



To write your perfect funding application...

Part 2: Tips from fundraising pros!*

- Write with passion about your work. Be factual, but also be enthusiastic & positive.
- Read the criteria carefully! It's amazing how many people don't...
- Share your users' perspectives
- Edit, edit, edit...
- Answer the question! It's THE best rule.
- Don't make funders work too hard to understand what you're doing
- Don't give up! Ask questions, get feedback, try again.

@TNLComFundScot

* with thanks to the Institute of Fundraising LinkedIn group

“Don't be afraid to **bring personality into your writing** and use this opportunity to **centre the perspectives of your beneficiaries**. We want to be inspired by words that lift off the page to tell a **compelling and brilliant story.**”

Comic Relief


“Our Trustees enjoy reading applications that are **brought to life with images and one or two case studies** that illustrate the impact of an organisation's work. If your work has **an emotional impact** or **brings you joy**, you can **tell us that too**. A balance between ‘head’ and ‘heart’ can make a proposal much more compelling.”

Garfield Weston Foundation

Steps to successful fundraising

Show your impact

Case studies, quotes	Ask
Beneficiaries	What prompted you to get in touch with us? What would you do if our service wasn't here? What would they say to someone else thinking about using our service?
Volunteer drivers	What's the best thing about volunteering? What motivates you to volunteer? What's been a stand-out moment for you?
Staff and trustees	What are you most proud of? What do you think we do really well? What stories have stayed with you?
Funders	Why do you fund / support our service? What do you value most about it? What do you think makes us different?
Partners	How have you benefitted from working with us? What is the added value of working together?



Steps to Successful Fundraising

Searching for funding

Current funders – can you expand continuation funding with them?

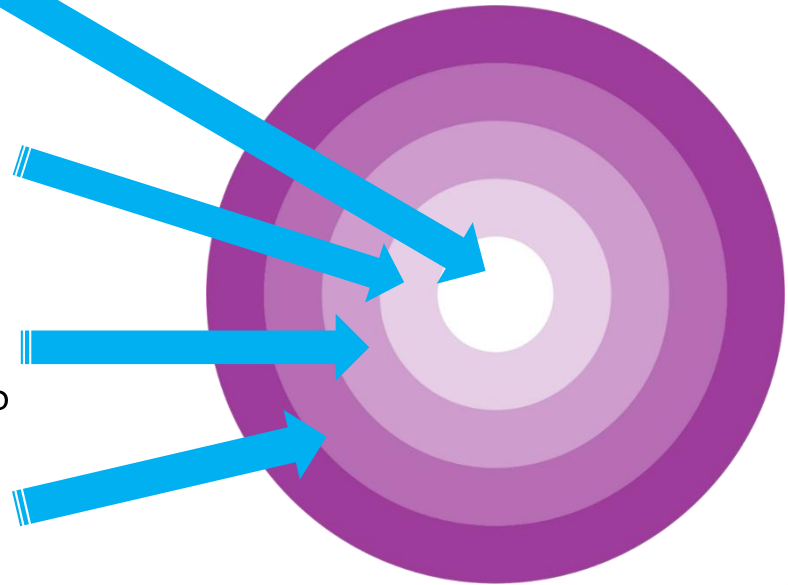
Funders who have given in the past – can you renew contact to update them and explore new funding proposals?

Likely funders – who are interested in the work you do (social isolation, community cohesion, climate change)?

Prospective funders – who is funding your 'competitors'?

The prospect onion

Start with the most likely prospects in the centre then work outwards (through the layers of the onion) to explore other prospects



Use **the 3 C's** to assess how responsive potential funders might be: **connection** to you, **concern** for your cause and **capacity** to give

Steps to Successful Fundraising

Searching for funding - Grants

GrantsOnline Starts at £125+ VAT for a single user for 1 year.

<https://www.grantsonline.org.uk/>



Directory for Social Change **‘Funds Online’ database** – £395+ VAT for 1 user <https://www.dsc.org.uk/funding-websites/>. Fundraising courses, prices vary.

DSC produces a **Directory of Grantmaking Trusts 2023-2024**, £125

<https://www.dsc.org.uk/publication/the-directory-of-grant-making-trusts-2022-23/>

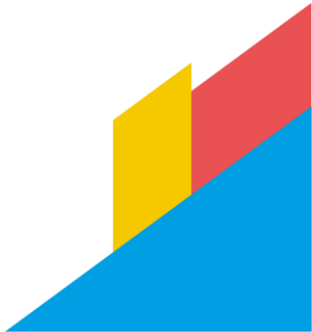
Subsidised courses and workshops on fundraising topics: the **Foundation for Social Improvement** <https://www.thefsi.org/> Average market value of training is £300 for a full day – FSI courses start at £20.



Steps to successful fundraising

Searching for funding - Tenders

- Create a project plan and allocate tasks / clear timescales
- Co-ordinate information needed e.g. budgets, job descriptions, policies
- Check opportunities to **use 'clarification questions'**
- Are all your supporting documents up-to-date?
- **Use the scoring approach and weightings as a guide for your answers**
- Refer to relevant local and national policies and strategies
- Fill the gaps – show how your service complements other services
- **Attachments – infographics, impact summary, outcome logic model**
- Demonstrate a clear understanding of how you'll mitigate any risks
- Provide evidence / data to show how you meet the needs of the target group
- **Value for money – what can you deliver that adds value?**



Steps to Successful Fundraising

Searching for funding - Tenders

The Chest Procurement Portal

Opportunity to join Councils' Dynamic Purchasing Systems to deliver specialist transport services. Need to complete a qualifying questionnaire. Tender opportunities – the portal brings together buyers and suppliers.

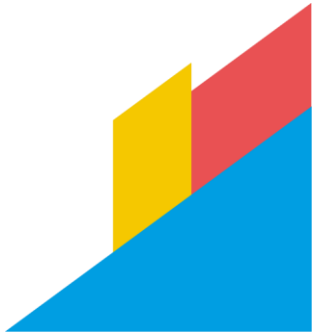
<https://www.the-chest.org.uk/>

Contracts Finder

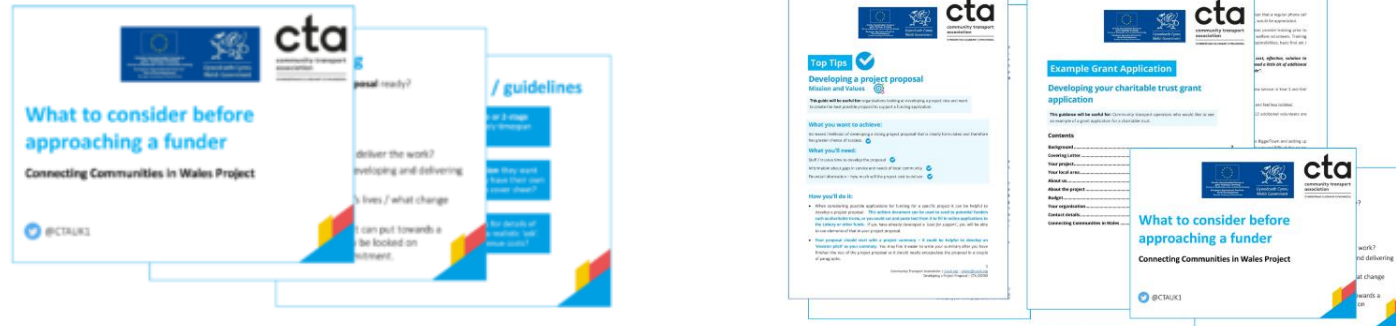
Search for information about contracts worth over £10K with the government and its agencies <https://www.gov.uk/contracts-finder>

Find a Tender

For higher value contracts, usually over £118K, please visit <https://www.gov.uk/find-tender>



More information and support



There are some **funding advice resources** on CTA website that may be helpful <https://ctauk.org/cciw/resources/>

If you would like **to discuss developing your services**, please contact your local CTA Development Officer. CTA has access to Grants Online and can run funding searches.

Your **local CVS / CVC** is also a good source of support and advice.