

**cta**

community transport  
association

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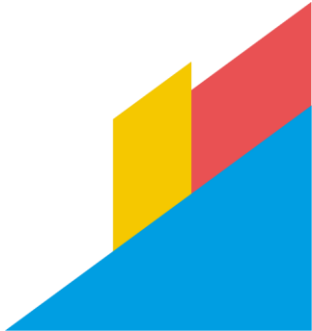
# Steps to Successful Fundraising

Tackling Loneliness Peer Network 25 October 2022

**Michelle Clarke, Wales Transport Strategy Lead**



@CTAUK1



# A few examples of previous fundraising



Clockwise: Village Car and Coordinator (Conwy), Food van for meals on wheels service (Denbighshire), vehicle for Flintshire, electric cars, Co-ordinator and driver for Bethesda, Ways to Wellbeing project for Nefyn.

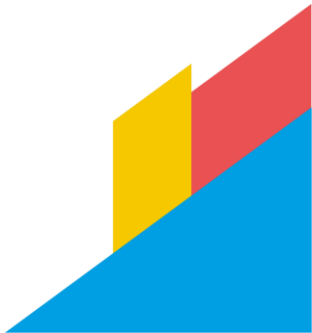


# Steps to Successful Fundraising

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## What we'll cover...

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

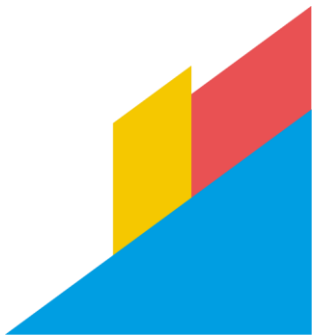


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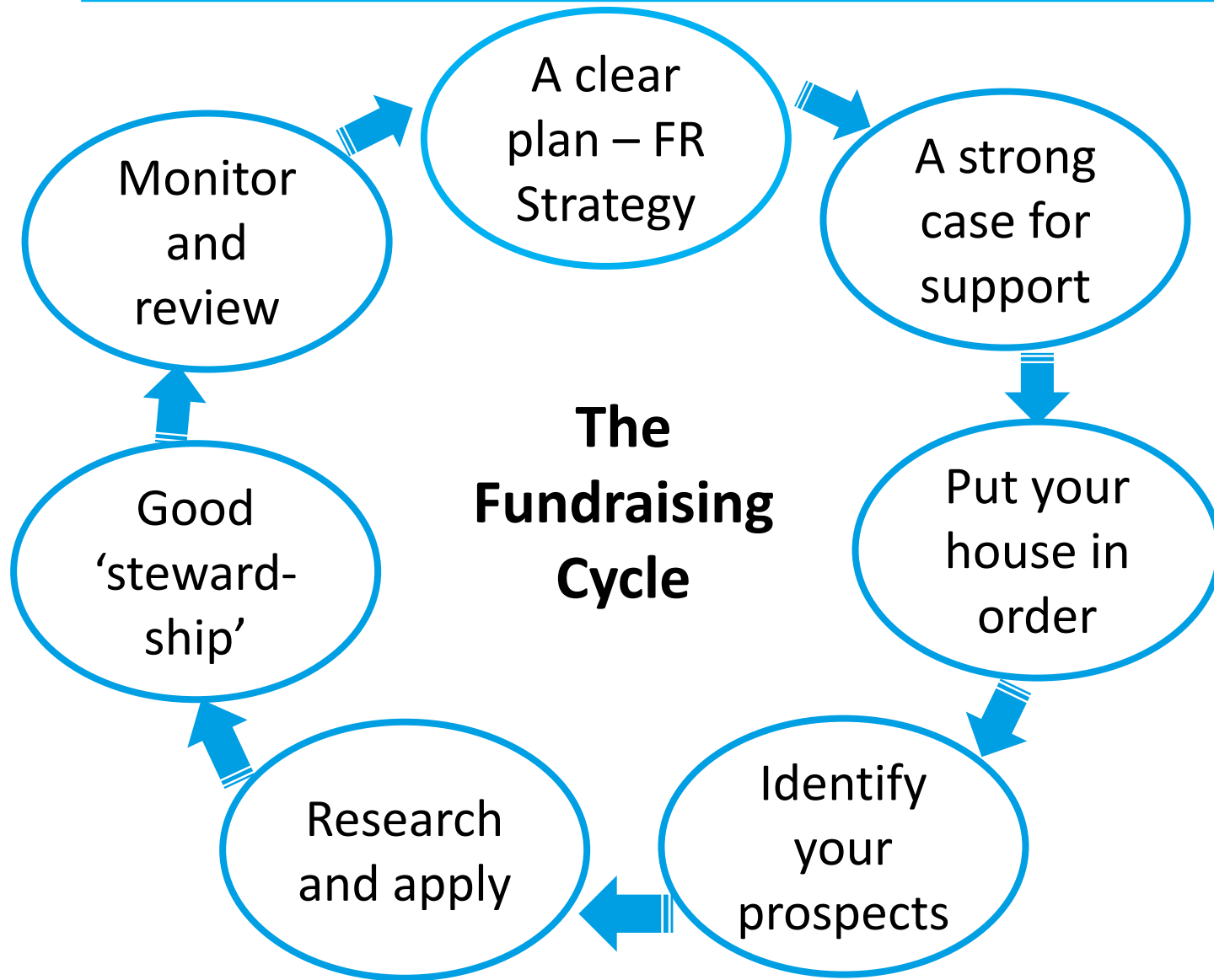
## Quick question

The **Fundraising Cycle** -  
what are the main  
elements?



# Steps to Successful Fundraising

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Overall focus on

- making the **best use of resources**
- increasing / **diversifying funding**
- **proactive approach** re funding timescales



# Steps to Successful Fundraising

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## Fundraising Strategy

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?



## 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?’



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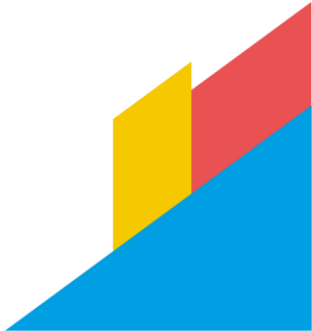
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## Content of a Fundraising Strategy

Needs to be **appropriate** to the nature of your charity **and proportionate** to its size:

- 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



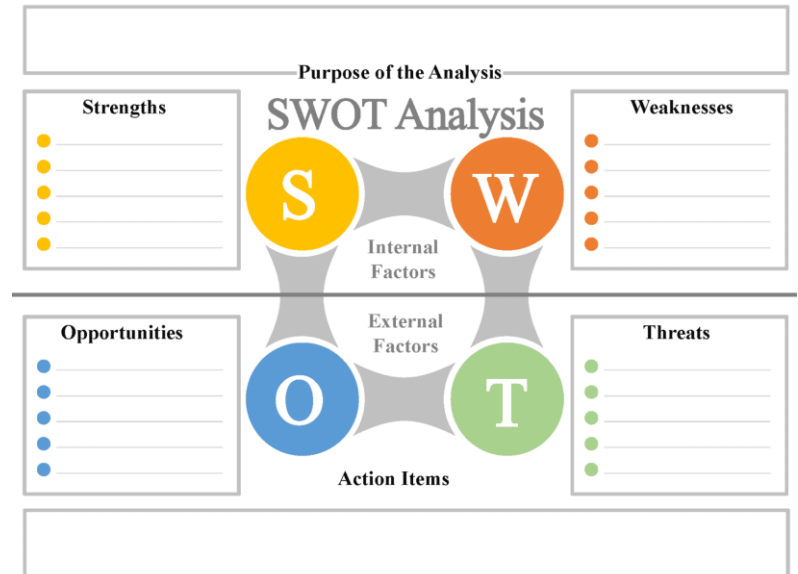
# Steps to Successful Fundraising

## 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

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## Strengths

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

## Weaknesses

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

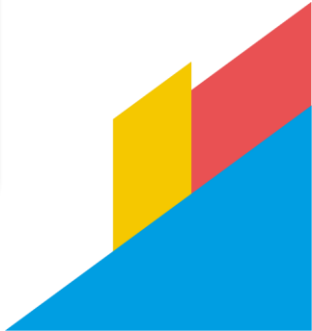
**SWOT  
analysis**

## 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

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## Case for Support

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

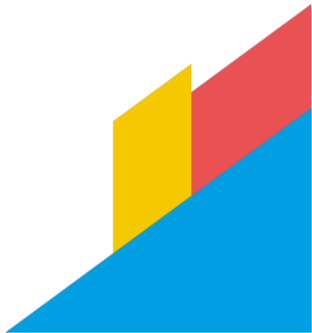
Chartered Institute of Fundraising

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.



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## Need

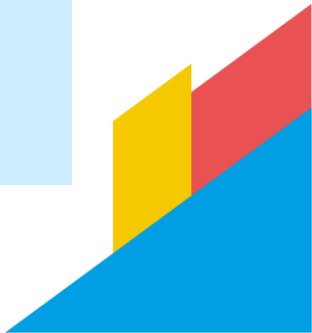
- Why your organisation exists in the first place
- What motivates and drives your work?
- Aim to connect people to your work on an emotional level

## 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




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**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. **need**

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. **activities**

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."* **difference**

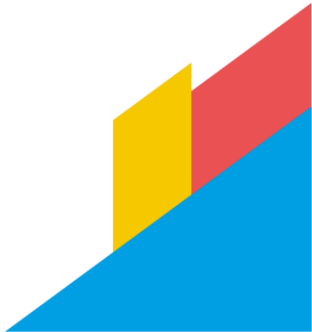


# Steps to Successful Fundraising

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## Quick question

What **Red Flags** do you think might raise questions in the funder's mind?



# Steps to Successful Fundraising

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## Housekeeping

- ? Any red flags in your Annual Report and Accounts e.g. low / high level of reserves?
- ? Any late filing of accounts with regulators such as Charity Commission?
- ? Are policies and training records up-to-date e.g. safeguarding?
- ? Robust trustee board / level of leadership expertise?
- ? Any contracts ended early?

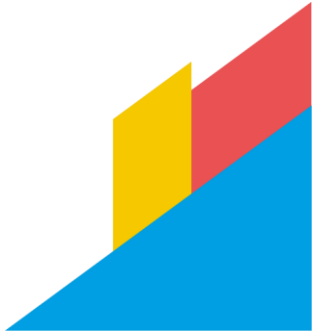


# Steps to successful fundraising

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## Housekeeping - address the following in applications

- Meets the grant **criteria**
- Project matches the grant programme or **funder's aims**
- Project is specific and **clearly described**
- Great **evidence of impact**
- **Low risk** ('risk attitude' varies from funder to funder)
- **Works in partnership** / well-networked
- **User-voice** heard at different levels of the organisation
- Excellent governance and **leadership**
- **Track record** is well described



# Steps to successful fundraising



**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

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## 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

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## Show your impact **North Norfolk Community Transport**



“It is so good to be collected from home, drive safely, cared for, and deposited back home feeling secure.”



“These excursions enable me to visit places that I couldn't otherwise get to. Thank you!”



“You make an enormous difference! I can get out and about from my home and I feel independent.”



# Steps to Successful Fundraising

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## Searching for funding

**Current funders** – can you expand continuation funding with them?

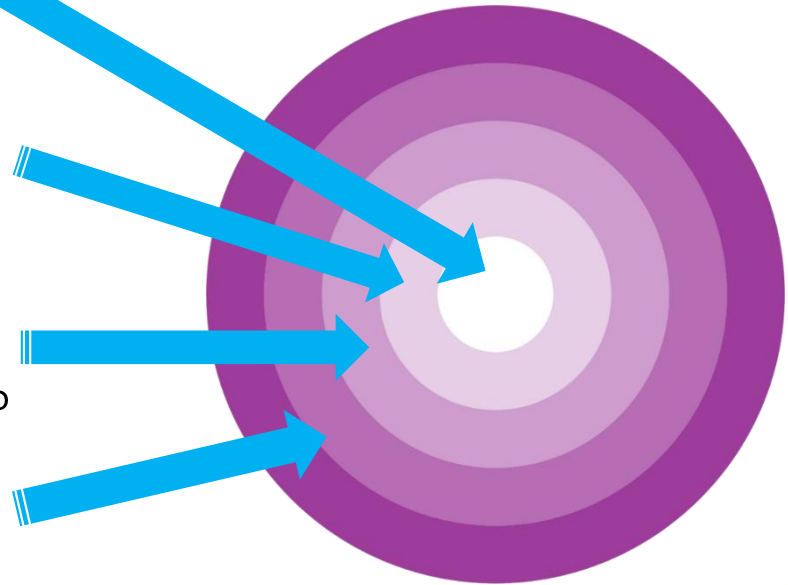
**Funders who have given in the past** – can you renew contact to update them and explore new funding proposals?

**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

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## Searching for funding - Grants

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

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

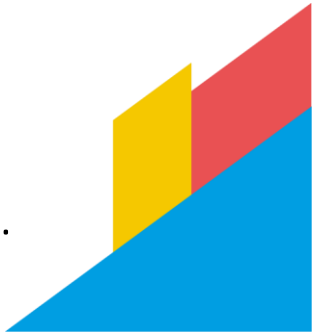


Directory for Social Change **'Funds Online' database** – £395+ VAT for 1 user <https://www.dsc.org.uk/funding-websites/>. Fundraising courses, prices vary.

DSC produces a **Directory of Grantmaking Trusts 2022-2023**, £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.

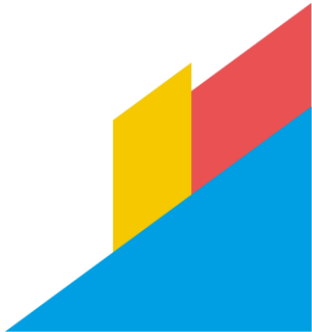


# Steps to successful fundraising

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## 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?**



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## 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.

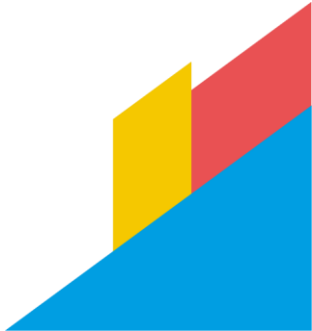
<https://www.the-chest.org.uk/>

### **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



If you would like **constructive feedback on draft applications**, please contact: [michelle@ctauk.org](mailto:michelle@ctauk.org)

If you have **ideas for other funding topics**, please let us know.

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



<https://ctauk.org/cciw/resources/>



# ADDITIONAL RESOURCES





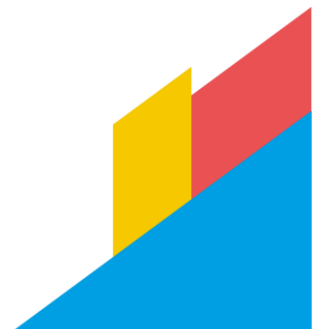
# Case for support

## Your 9-part Case Framework

A case for support can be focused on a specific project or campaign, or provide a more general overview of your organisation – adapt it to suit your purpose and move the sections around until you're happy with the flow of the document. The content can be used on your website, social media and in other communications.



Sections	Content
1. An emotional opening	Hook the reader and make them feel a connection to your cause. Share a short case study or pen portrait.
2. Your mission / vision	The 'why' does your organisation exist. Why should people care? What is your vision for the future? What difference do you make to the lives of others?
3. The problem	What problem are you trying to solve? What's keeping your organisation from achieving your vision? This statement of the problem sets up the solution.
4. The plan	How will you overcome the problem so you can achieve your vision? Spell out what you plan to do with the money you raise, and how that will solve the problem.
5. The costs	How much money does your organisation need to raise this year? Over the next three years? Or for this project? Summarize the elements of your budget – what's your working goal?
6. Brief history	Provide a succinct overview of the organisation and achievements to date – build credibility through your organisation's track record.
7. Outcomes, stories and proof of impact	Add in stories of those you have helped and use testimonials, statistics and infographics or charts to demonstrate the difference you make.
8. Your 'why now'?	Why is it important to solve the problem now? How can you convey a sense of urgency?
9. Your call to action	What can a supporter do to help solve the problem and achieve the vision? How can they give, and at what levels? Make a clear and specific ask.



# Case study

## Include the three vital elements

Case studies are all about illustrating the vital change your organisation has made to someone's life. People want to hear the impact of your work. Don't be tempted to use your organisation's 'house style' or 'tone of voice' – keep it real as even changing a few words can shift personality and authenticity. There are three easy to remember elements to a good case study:

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The key elements	Content
Before	<p>The person's situation before they got involved with your organisation, for example:</p> <p>"I wasn't able to drive after being diagnosed with glaucoma. It was a lonely time because I couldn't go out. There are no buses where I live, and sometimes I wasn't seeing anyone to talk to for weeks at a time..."</p>
During	<p>How they got involved with your organisation, what services they use, and how it has helped, for example:</p> <p>"It was only when I went for a routine appointment at the eye clinic – I had got a taxi there – that one of the staff told me about A2B CT and gave me a phone number. It took me a while to make the call but I'm so glad I did. They encouraged me to go on a trip, picked me up from the door and I had a lovely time! It all started from there, really."</p>
After	<p>How their life is different as a result / their improved situation, for example:</p> <p>"It's made such a difference to how I feel – I look forward to going out every week, and I've made some good friends. The good care from the drivers means that I don't worry about anything. I wish I'd heard about them sooner – it's a fantastic service!"</p>



# SWOT Analysis (Fundraising)

Strengths and weaknesses are internal factors, and Opportunities and threats are external factors



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<b>Strengths</b>	<b>Weaknesses</b>
<p>What is your organisation good at? How is your organisation unique? What are the distinctive qualities that separate you from your competitors? What internal resources does your organisation have, such as staff with experience in income generation?</p>	<p>What are the things your organisation lacks, such as enough staff time to research funding opportunities or grant database software? Are there things that your competitors do better than you? Is your Unique Selling proposition (USP) unclear?</p>
<b>Opportunities</b>	<b>Threats</b>
<p>What opportunities can you think of? Perhaps there are few competitors in your area or a growing demand for your services due to population demographics. Or perhaps there are opportunities for increased partnership working or community involvement?</p>	<p>Are there any potential threats on the horizon? Are there emerging competitors? Is the regulatory environment changing? Are there imminent reductions in funding streams such as the Bus Service Operators Grant?</p>

