

How To Guide

Made with Hope's Charity Commission details and finances:

<https://register-of-charities.charitycommission.gov.uk/charity-search/-/charity-details/5049696>

Where to research:

- Website (check when it was last updated)
- Financial accounts and reports of trusts << most time and cost effective
- Financial accounts of similar charities << most time and cost effective
- Google News
- <http://www.trustfunding.org.uk/> - (run by Directory of Social Change. Not free)
- <https://www.fundingcentral.org.uk/default.aspx>
- <http://www.open4funding.info/> and <https://www.idoxgrantfinder.co.uk/>
- <http://www.jonmatthews.co.uk/>
- <https://www.beehivegiving.org/>
- <http://www.smallcharities.org.uk/resources-funding-databases/>
- <http://apps.charitycommission.gov.uk/showcharity/registerofcharities/RegisterHomePage.aspx> (good for finding newly registered trusts)
- <https://www.grantsonline.org.uk/> (can do a free trial)
- <http://www.thefsi.org/> (an old favourite...)
- <https://grants-search.turn2us.org.uk/>
- <http://www.acf.org.uk/>
- <http://www.ukcommunityfoundations.org/>
- <https://olib.uk/charity/html/> (searchable version of Charity Commission)
- <http://ngonewsafrika.org/>

Key resources

- Donor's website (check when last updated and when next call for proposals is due)

- [Charity Commission](#) (interrogate financial accounts/report; check shared trustees)
- [Trust Fundraising Yahoo group](#) (can search archive online. Need to sign up)
- [FundsforNGOs](#) (can pay for premium version)

Search engines and websites with funding opportunities

- <https://www.grantsonline.org.uk/> (can do a free trial, suggest signing up and harvesting data before trial runs out)
- <https://www.bond.org.uk>
- <http://www.fundingforall.org.uk>
- <http://www.advance-africa.com/Grants-for-NGOs-and-Organisations.html>
- <https://olib.uk/charity/html> (like CC but more advanced search - a potential goldmine!)
- <https://www.devex.com/funding> (international development site)
- <http://grantnav.threesixtygiving.org>
- <https://www.beehivegiving.org>
- <http://www.getgrants.org.uk/> (can sign up to free newsletter)
- <http://www.jonmatthews.co.uk/> (regular updates RE donor calls for proposals)
- <https://www.fundingcentral.org.uk/default.aspx> (mainly UK but still useful)
- <http://www.open4funding.info/> (mainly UK)
- <https://www.idoxgrantfinder.co.uk/> (mainly UK)

News

- <https://www.charityconnect.co.uk/> (also has useful forums section)
- <https://fundraising.co.uk/category/news>
- [Google News](#) (useful to find out if a donor has had any good/bad press)
- <http://www.thirdsector.co.uk/>
- http://ngonewsafrika.org/?page_id=16841

Other Resources and useful websites

- <http://guidestar.org.uk/Default.aspx> (building global network of CSOs)
- <http://www.smallcharities.org.uk/resources-funding-databases/>
- <https://vr.volresource.org.uk/org/fundraising/> (general advice and some links)
- <http://www.ccrdaeth.org/> (Consortium of Christian Relief and Development Associations)
- <https://www.gov.uk/international-development-funding> (including DFID)
- <http://www.welcomeurope.com/> (European grants)
- <http://www.acf.org.uk/> (Association of Charitable Foundations)
- [London livery companies](#) (mostly London but some international support)
- <http://www.cgap.org.uk/> (research around grant-making)
- http://sporkforge.com/text/word_count.php (useful for checking content isn't duplicated)
- <https://grants-search.turn2us.org.uk/> (mainly for individuals in need)

FR good practice

- <https://knowhownonprofit.org> (how to write a winning funding bid)
- [inside-the-mind-of-a-grant-maker-useful-stuff-on-how-grant-making-work....pdf](#)
- [Nuffield Foundation Global Grant Making](#)
- [How to Retain Donors White Paper](#)
- [IoF-good-asking-report.pdf](#)
- [How to Raise Funds from Gulf Foundations](#)

- [Strategic Planning for NGOs](#)

When researching ask the following questions:

At the start, gather essential info of the project: logistics, money, key dates, number of people it will support.

- Research is very important! It will make the difference in quality.
- Find trusts that are best fit for you.
- Sites: Funding Central (free <£100,000 turnover), trustfunding.org.
- 36% of applications are ineligible because of lack of research.
- Look for similar charities and see what trusts they apply for.
- What are their objects? Are we a good fit?
- Timescales for submitting applications?
- Average grant amount?
- Any excluding criteria?
- Maximum/minimum funding?
- Are they a religious trust?
- What other similar organisations have they supported?
- How extensive is application process?
- Do they fund projects or core?
- Research trustees – are they trustees of any other orgs? Do we have a relationship with them?
- Which current funding gaps could be matched to the donor?
- What project could be designed around donor?
- Does the donor want to be the main funder, sole funder, or co-funder?

Pitching to Trusts & Foundations (John Wallace)

1. Know your audience
 - Who is it you will be likely to talk to? Is it a trustee directly or admin staff? For smaller trusts you are more likely to be speaking with a trustee directly (they may be more reluctant to speak

to applicants, or have less time). Larger trusts often employ administrators, who may have more time or be more relaxed about engaging with prospective applicants.

- Try and find out who you will be talking with in advance and decide how you can connect with them on a personal level. Have they visited any of our project countries for example or worked in the field of street children or with young people more generally?
- Be respectful and make sure this is an appropriate time for them to take the call. Offer alternative call times if not.
- Never ask immediately if we can apply for money, this approach is likely to make them feel uncomfortable if they have not talked to you before or do not know of the organisation. It is a legitimate question and the key is timing.
- However, in general most trusts and foundations are open to having a preliminary conversation- this saves time for them in the long term as well as for charities who will get a clearer idea of whether it is worth submitting an application.
- Tailor your approach to who you're speaking to and their likely interests/ level of expertise; e.g large international development organisations will be more interested in our theory of change and SOPs, than a small family foundation who will simply want to know about the children we help.

2. Research

- Read all available information via website etc, demonstrate you have found out as much as possible before calling and that you are calling with specific questions that will help you decide whether to apply, or how to complete your application.
- Know their priorities and how Retrak fits in with these, have a good understanding of our Theory of Change but don't worry if you don't have things to hand as any further information can be sent via e-mail if required.
- If they often collaborate with other foundations that support us then make sure to name drop them.

3. Engaging with Trusts & Foundations over the phone

- Don't overwhelm them with information or begin with a narrative about Retrak and everything we do. Discuss things that are most relevant to that trust and their priorities.
- Don't let a negative response throw you off. Try and win whoever is on the other end of the phone over as often the most reluctant to start with can be the most helpful if you continue to engage with them enthusiastically – "kill them with kindness".
- Make sure to ask specific questions, once you're sure the information isn't already publicly available, for example:
 - I see the Trust currently prioritises... (education); would this include... (vocational training and apprenticeships)?

- I see you have an application form, could you clarify question...
 - Could you provide some guidance on how early to submit an application prior to the trustees meeting?
 - Would the trust consider applications for multi-year funding?
 - This is an opportunity to ask questions that demonstrate knowledge about your particular field, for instance the cities we work in, the challenges currently facing the countries we work in.
 - Listen carefully to what they say and be prepared to ask follow up/supplementary questions as this may give us access to information that other charities that haven't pursued phone contact will not have. This is the really valuable information which would give your application a competitive advantage, for example knowledge of particular trustees' interests and preferences.
 - If trustees have connections to any of our project countries invite them to visit one of our drop-in centres.
- 4. What can we ask from them?**
- It's reasonable to ask them to explain their priorities further, or give examples of previous grants made.
 - Guidance on funding requests, if the amounts aren't already clear; for example, is there an amount you would recommend requesting for an organisation applying for the first time?
 - Would they be willing to look at a draft application and give us some feedback – this is a possibility especially if talking to admin staff.
 - Seek permission for further contact and always end the conversation with agreed next steps which allow for further contact.

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Writing and submitting applications

- If you feel the trust would be open to it, try a preliminary phone call/email to see what kind of project they would like to fund. Contact on the basis that we don't want to waste their time by putting in an inappropriate application
- Always cater to individual donor – change wording, structure and emphasis to reflect the priorities of that trust
- Always address donor's specific criteria and how we meet them
- Rather than simply asking for a donation, demonstrate how our project enables the donor to fulfil their charitable aims. Emphasise shared priorities
- Depending on the outlook of the trust, emphasise timescale and need e.g. if we don't get funding by X the project can't take place
- Paraphrase donor's own wording – shows we've done research
- Ask for appropriate amount. If a current donor consider upping the ask, asking for a different project or even asking for core
- If rejected previously, avoid applying for same project again if possible
- **Do not** WE on your work. Rather, talk about how the trust's grant can make a difference
- Generally, the larger the trust the more financial info is required. For smaller trusts, detailed financial info may put them off, especially if project cost is high and the contribution asked of them is low
- Always send by favoured method of application e.g. online form; letter
- Personalise correspondence whenever possible
- ***Why are you the best organisation to deliver this project:***
What experience have you got of delivering similar projects
What is unique about the project, that only you can deliver
What is specific about your relationship to the potential users
What resources, skills, knowledge, or experience do you bring to the project?
- **Always include in trust proposals:**
3 what's and a why
what is the need you've identified?
what do you intend to do about it?
what will change as a result of what you do?
why are you the best org to do this?

Talking about sustainability:

BFSS Trust advised us that they view sustainability in the following ways. They are a well established Trust so we believe it's a good idea to take their advice and ensure we talk about our projects being sustainable in these ways and give examples/details if possible.

Ability - investing in local people to do the work, train and empower people to continue the project, we have a good

Resources - making resources locally, generating finances locally to support the ongoing costs of the project

Local - community commitment to supporting the ongoing maintenance, participatory approaches

Environment - sourcing materials locally, transporting materials effectively (bulk transport)

Training/Advice: Fundraising from Trusts & Foundations - Webinar Notes

Look at FSI website!

10,000 trusts contribute £2.4bn to UK charities.

Types: foundations, family/private trusts, community foundations, company foundations (charitable foundation set up by company that may get percentage of profits) and livery companies. Need to understand the difference between these!

Then shortlist eligible charities.

Structure:

- The problem - why does the charity/project need to exist? Show evidence/use surveys to prove need. Could also look at censuses, council info, other research from charities.
- Your solution - the project! Key points: timelines, outputs (how many sessions) vs outcomes (difference this will make). Tie these back into the problem.

- Clear budget - use heading and explain costs that are particularly high.
- Future plans - show that you've thought through the project and are aware of making it sustainable.

Use case studies! Can demonstrate your case and show that you meet the criteria of the trust.

Don't skip the application form! Follow the guidance they give.

Full cost - not just direct costs but overheads as well. Gets projection of running costs.

Give yourself enough time to look over it again in plenty of time. Get others to proof-read. Use passion but back up with problem/solution. Use short sentences where possible.

If unsuccessful, may not get a response as they have a lot to deal with! Applications fail because:

- Didn't fully match criteria (DO THE RESEARCH!)
- Didn't include everything asked for (Fill the criteria and meet their demands!)
- Asked for the wrong type of funding (make sure they fund the type of project you are carrying out)
- Received after closing date
- Didn't return an evaluation on a previous grant

Still send thank you email to thank for considering application.

If successful, reply within 24 hours and thank them in an email. Could also negotiate frequency of updates and offer to invite them to events? Celebrate success with team. Let everyone know what info the funder will require and when they will monitor/evaluate the work.

Report back to the trust/foundation!

Top Tips:

1. Get all the info ready to hand and organised.
2. Use Full Cost Recovery Budget.
3. Do research and cast net widely!
4. Find the right fit - understand criteria.
5. Plan and use time effectively - submit 1 month before deadline.

6. Make enough tailored applications - know and play the numbers game. Success rate between $\frac{1}{6}$ - $\frac{1}{8}$.
7. Fill in application form if available or do as they ask.
8. Provide evidence - prove the need for your work!
9. If Yes, respond in writing within 24 hours, if no, still thank them for time.
10. Always report back to the trust/foundation!

Q&A:

- Use headings and break application down to make it easy to read. Have summaries of each section to tell what's coming up. Extra info can be offered afterwards (available on request).
- Fundingcentral - NCVO. ~£100 but big database. DSC books to trustfunding.org in a hard copy book form.
- Keep trust updated - even if project is going off-track. You MUST report back! Just explain why it's happened.

Reporting to donors

- Keep record of any correspondence, reporting requirements and deadlines
- Chase if trust hasn't got back to you within specified deadline
- Gather appropriate information from project in-country well in advance of report deadline – many trusts v. keen to know breakdown of beneficiary number/types
- Check report against: original application and previous reports
- Submit new application with report if appropriate