

Fundraising from Grant-making Trusts and Foundations

Sean Tully

- **Introductions**
 - **About me**
 - **About you – aims from the session**
 - **About the session**
 - **About grants fundraising: being fundable**
- **Key ingredients of grants fundraising**
- **Putting it into practice**



WE START FROM WHERE YOU ARE NOW

There are many stages on a charity's journey, where there are decisions to be made, obstacles to be overcome. We have the people, skills and experience to help you on your way.

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THIRD SECTOR STRATEGY & FUNDRAISING CONSULTANTS

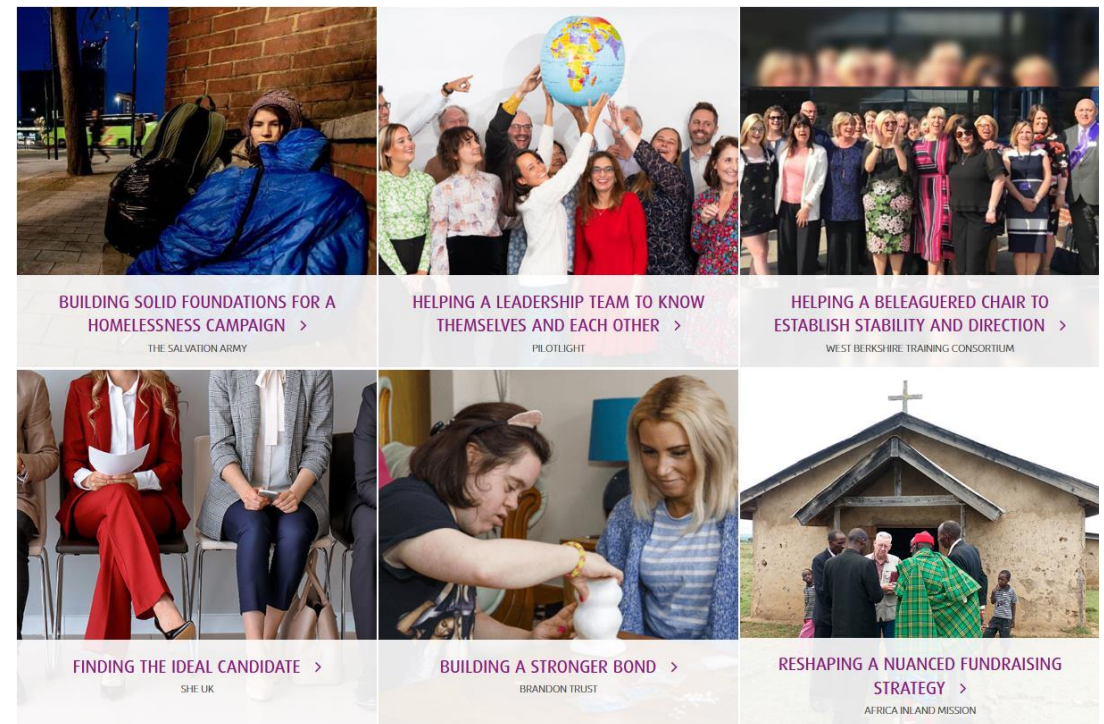
strategy and fundraising consultants

With more than three decades' experience in the charity sector and an unparalleled network of expert consultants to draw on, we are able to provide valuable, cost-effective support across all facets of running not-for-profit organisations including:

- **Charity governance**
- **Strategy development**
- **Fundraising consultancy**
- **Marketing consultancy**
- **Measuring outcomes and impact**
- **Charity recruitment**

How can we help you?

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Session Aims:

Where you are now

What you hope to learn

Where you hope to get to





BEING “FUNDABLE”



Key terms:



Revenue Costs – staff salaries, consumables, room hire, travel expenses etc.



Capital Costs – tangible ‘things’ – a minibus, computers, buildings etc.



Core Costs vs Project Costs – ongoing work vs project.

BEING “FUNDABLE”



Key terms:



Overheads – costs you incur simply to exist.



Full Cost Recovery – splitting your overheads (and sometimes core costs) between projects.



BEING “FUNDABLE”

- Your Trustees
- Your policies and procedures
- Your beneficiary involvement
- Your financial health

**BEING
“FUNDABLE”**

Full Cost Recovery:

<https://knowhow.ncvo.org.uk/organisation/financial-management/planning-and-budgeting/project-budgeting-and-full-cost-recovery>

<https://www.tnlcommunityfund.org.uk/funding/funding-guidance/full-cost-recovery>

TRUST & FOUNDATIONS

- **What?** – Usually cause or issue focused to some degree.
- **Why?** – Return on Investment is very good (around £10 for every £1 spent/invested).
- **How?** – Success rates can vary. Could be 1-in-12 for a ‘cold ask’ or perhaps 1-in-5 for a ‘warm ask’.



SO WHAT?

*“When you’ve seen one
Grant-making body...*

*...you’ve seen one
Grant-making body!”*



- **Key ingredients of grants fundraising**
 - **Knowing what you need**
 - **Knowing who might fund it (research)**
 - **Making the connection (strategy and story-telling)**
 - **Building the relationship**
 - **Keeping track of it all**



THE LEGO APPROACH TO TRUST FUNDRAISING

BUILDING YOUR CASE FOR SUPPORT

WHETHER YOU ARE WRITING A CASE FOR SUPPORT FROM SCRATCH OR ARE LOOKING TO REFRESH YOUR APPLICATIONS, THIS TOOLKIT WILL HELP YOU TO STREAMLINE AND IMPROVE YOUR TRUSTS AND GRANTS FUNDRAISING.

USE THIS WORKSHEET TO APPLY OUR LEGO APPROACH TO YOUR OWN FUNDRAISING. USE THE BUILDING BLOCKS PROVIDED TO BEGIN YOUR CASE FOR SUPPORT AND IDENTIFY ANY FURTHER INFORMATION OR DETAIL YOU NEED, HELPING YOU TO GO BACK TO YOUR CHARITY AND ASK THE RIGHT QUESTIONS.

REMEMBER OUR THREE Cs WHEN BUILDING YOUR CASE FOR SUPPORT...

COMPELLING

DOES YOUR CASE FOR SUPPORT HAVE AN EMOTIONAL IMPACT? THE TRICK IS TO MAKE SURE YOU ARE TELLING A STORY AND MAKE USE OF YOUR BENEFICIARIES' VOICE THROUGH CASE STUDIES, PICTURES AND QUOTES. TRY TO CREATE URGENCY. WHY DOES YOUR WORK NEED SUPPORTING RIGHT NOW?

CLEAR

DOES IT MAKE SENSE TO SOMEONE WHO DOESN'T KNOW ABOUT YOUR WORK? ASK SOMEONE ELSE TO READ IT. AVOID USING TECHNICAL LANGUAGE AND LENGTHY EXPLANATIONS. YOU WILL OFTEN HAVE TO COMPLETE APPLICATIONS WITH TIGHT WORD COUNTS, FIND THE SIMPLEST WAY TO EXPLAIN YOUR PROPOSAL.

COMPREHENSIVE

YOUR CASE FOR SUPPORT IS A TEMPLATE, IT NEEDS TO CONTAIN ALL OF THE ANSWERS TO THE QUESTIONS FUNDERS ARE LIKELY TO ASK. YOU NEED TO DEMONSTRATE THAT YOU HAVE CONSIDERED ALL RELEVANT ASPECTS OF YOUR WORK. REMEMBER TO BACK UP WHAT YOU ARE SAYING WITH EVIDENCE.



GET IN TOUCH:
Amy Appleton, KEDA Consulting
amy.appleton@kedaconsulting.co.uk
Mat Cottle-Shaw, BCRT
mat.cottle-shaw@bcrt.org.uk



Getting your application right

- <https://www.kedaconsulting.co.uk/2019/09/26/the-lego-approach-to-trust-fundraising/>
- Free to download and useful for Trust fundraising but also your general Case for Support.



Getting your application right

- **The Need:**

- What is the problem?
- Why is it a problem?
- Prove it!
- Who decided it is a problem?
- Is anyone else trying to fix it?



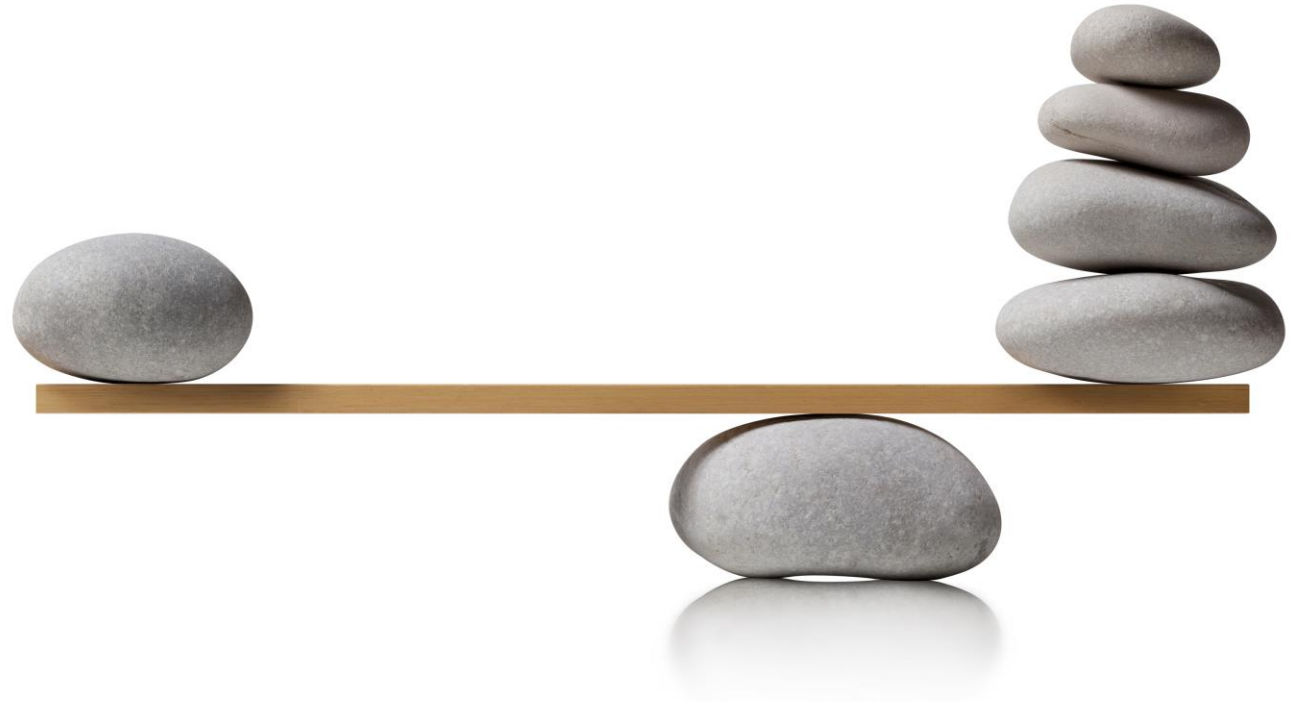
Getting your application right

The Solution:

- The aim of the project
- Outcomes
 - What will be the impact?
- Outputs/Activities
 - What will you do to achieve the outcome(s)?

Getting your application right

- **Monitoring and Evaluation:**
 - Measuring Tools
 - How often?
 - How will you involve beneficiaries in evaluation?
 - What questions do you need to ask to demonstrate your outcomes?



Getting your application right

- **Sustainability:**
 - What will happen after the funding ends?
 - Could it fund itself?
 - What will be the legacy of the work?
 - Will the funding help make the charity more sustainable?





Getting your application right

- **Organisational Info:**

- What is your charity's experience?
- Who are your partners?
- Key achievements?
- Who leads the charity?
- Financial info?

Getting your application right

- **Budget and funding plan:**
 - What is the budget?
 - How much is secured?
 - Funding plan (for the rest)?



FINDING FUNDERS

- Start broad and focus in.
- Try more than one set of search terms.
- Keep note of the search terms you use.
- Aim for a long-list and then refine it.



Funding

- Where do you find grant funding?
- BOND: <https://www.bond.org.uk/>
- DONOR TRACKER: <https://donortracker.org/>
- My Funding Central: <https://www.myfundingcentral.co.uk/>
- Directory of social change: <https://fundsonline.org.uk/>
- Grants Online: <https://www.grantsonline.org.uk/>
- Fundsforngos: <https://fundsforngospremium.com>





Funding

- Developmentaid: <https://www.developmentaid.org/home>
- DevEx: <https://www.devex.com/>
- UK Government: <https://www.gov.uk/international-development-funding>
- European Commission: https://ec.europa.eu/international-partnerships/grants_en
- OPEC: <https://opecfund.org/>



Funding

- Global Fund (Aids, TB, Malaria): <https://www.theglobalfund.org/en/>
- Council of Foundations (and page on Global Grantmaking): <https://www.cof.org/topic/global-grantmaking>
- ACF: <https://www.acf.org.uk/>
- Web search: your favourite web browser
- Social media channels like LinkedIn, Twitter

A photograph of a man in a wheelchair sitting in a library aisle, reading a book. He is wearing a red and white plaid shirt and blue jeans. The aisle is lined with tall bookshelves filled with books. The lighting is warm and soft, creating a quiet and studious atmosphere.

SHORTLISTING FUNDERS

- Where to find the information?
 - Database
 - Funders' website
 - Charity Commission accounts
 - Web-search

A photograph of two hands shaking in a firm grip. The hand on the left is dark-skinned, and the hand on the right is light-skinned. A white square frame is superimposed over the point where the hands meet. The background is a plain, light grey color.

SHORTLISTING FUNDERS

- Are they right for you?
 - Type: revenue/capital etc?
 - Cause/issue?

A photograph of two hands shaking, one from a person with dark skin and one from a person with light skin. A white square frame is superimposed over the hands where they are clasped. The background is a plain, light grey color.

SHORTLISTING FUNDERS

- Are you right for them?
 - Location?
 - Legal structure?
 - Size by income?
 - Cause/issue?
 - Unsolicited?

SHORTLISTING FUNDERS

- Funder Name
- Priorities
- Fit to your work
- Grant sizes
- Deadline
- Application method
- Any notes





KEEPING FUNDERS ENGAGED

- Thank
- Involve
- Report
- Re-ask

- **Putting it into practice**
 - **Avoiding mistakes**
 - **Managing expectations**



NEVER say to your fundraiser #1:
“Go after the **low-hanging fruit.**”



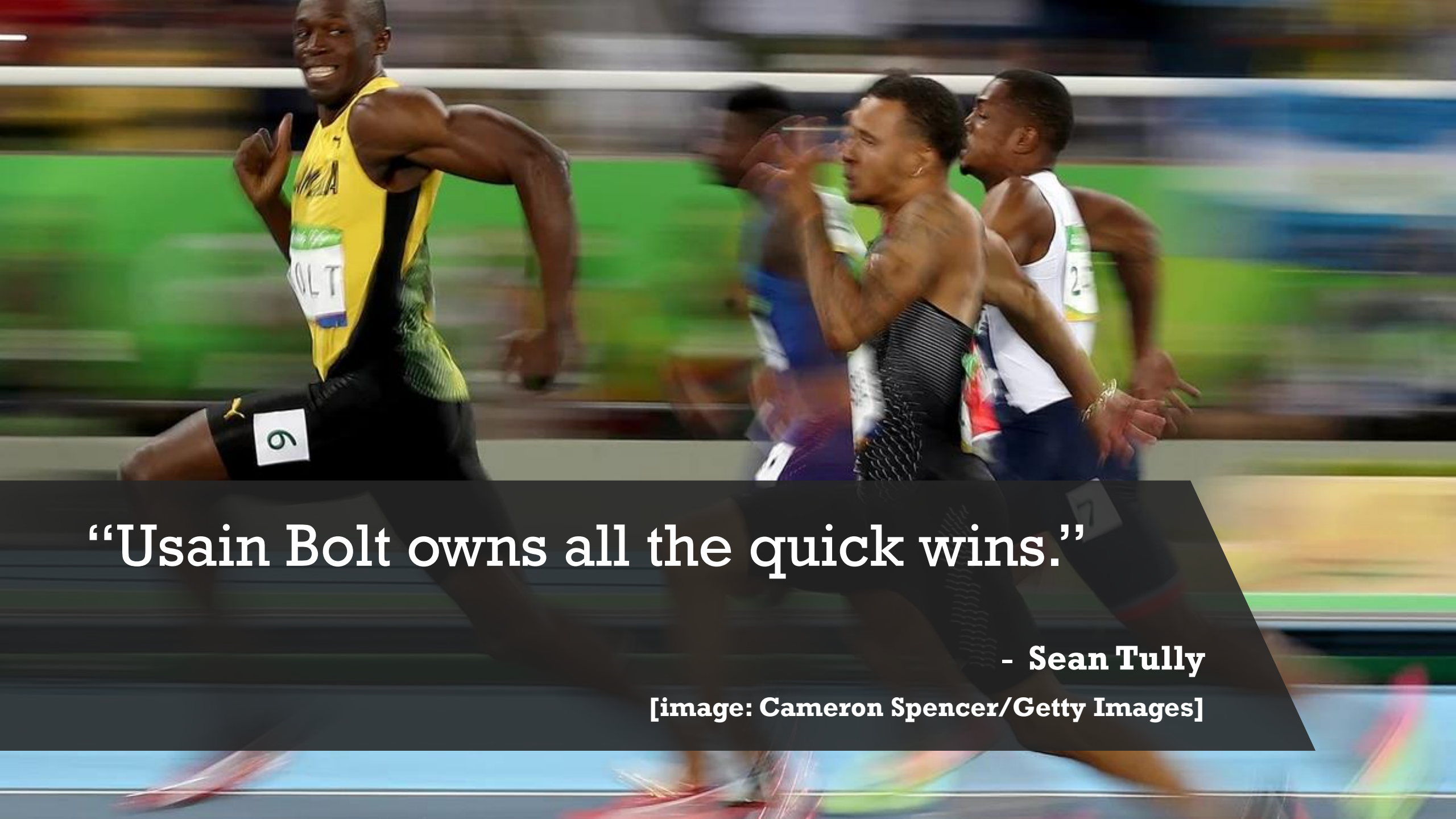


“All the low hanging fruit has been eaten by the unicorns”

- Bernard Ross, Director, =mc

NEVER say to your fundraiser #2:
“Let’s prioritise the
quick wins.”






“Usain Bolt owns all the quick wins.”

- Sean Tully

[image: Cameron Spencer/Getty Images]

NEVER say to a funder:
“We are the only organization
doing this work.”



A network diagram with white human figures on a dark background, connected by lines. The figures are arranged in a circular pattern, with lines connecting them to form a web. The text is centered in the middle of the image.

Instead, talk about
collaboration and
your contribution to
the bigger picture.

Managing Expectations (including your own)

- Fundraise! It's why you are here.
- Report to funders and build relationships. People give to people.
- Keep people notified of what you need from them in advance (stories, finances).
- Fill the pipeline – demonstrate potential.
- Update all records – know what you know.



What does “good” look like?

From a recent Benchmarking report:

- *“Colleagues reported trust fundraising success rates as low as 1 in 12 for cold approaches rising to 1 in 3 for warmer, more established relationships.”*
- ***The average (results) suggests a much lower trust fundraising success rate of 1 in 7 applications (as opposed to 1 in 3).”***

- LarkOwl



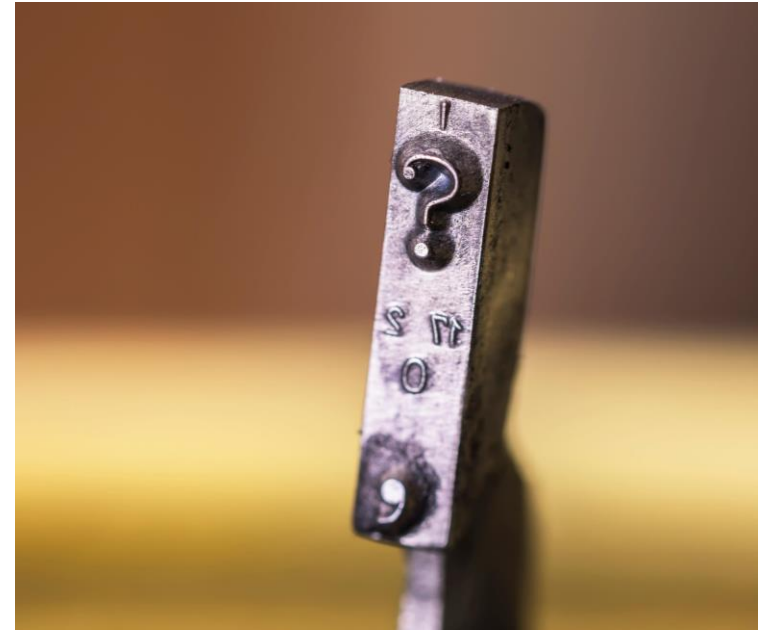


Knowing what you know...

“Those who know their data, who study it and who understand it are more likely to be in the business of seeking to improve it.

Simply knowing your data is the first step towards improving your own ROI.”

- LarkOwl



Common Questions

Common Questions



- **Is it necessary for overseas Not-for-Profits to have a UK-based registered charity to access UK-based Trusts?**
- No, it is not necessary for overseas NFPs to have a UK based registered trust although it is certainly the preferred route for most of the UK based trusts.
- Usually, governance arrangements need to be strong.

Common Questions



- **How do other countries compare to the UK Trusts and Foundations marketplace?**
- The UK Trusts & Foundations market-place is an established space however, it offers approximately close to just 2% of funding for international development causes. A useful resource is the annual Foundation Giving Trends reports from the Association of Charitable Foundations which provides key facts and figures on giving, income and assets in the top 300 UK independent charitable foundations.
<https://www.acf.org.uk/ACF/ACF/Research---resources/Research%20content/Research.aspx#example>

Common Questions



- **What legal structures are required by overseas funders?**

- The legal structures required by overseas funders are similar to the local charities, i.e. charities should be registered entities as Trusts/companies in compliance with the charity laws of the country.
- In some specific countries like India, the recipient organizations should also have a FCRA certificate (Foreign Contribution Regulation Act) in order to receive foreign funding.

Common Questions



- **How similar/different is the process of applying overseas? How similar/different does the 'typical' application look compared to those for UK?**

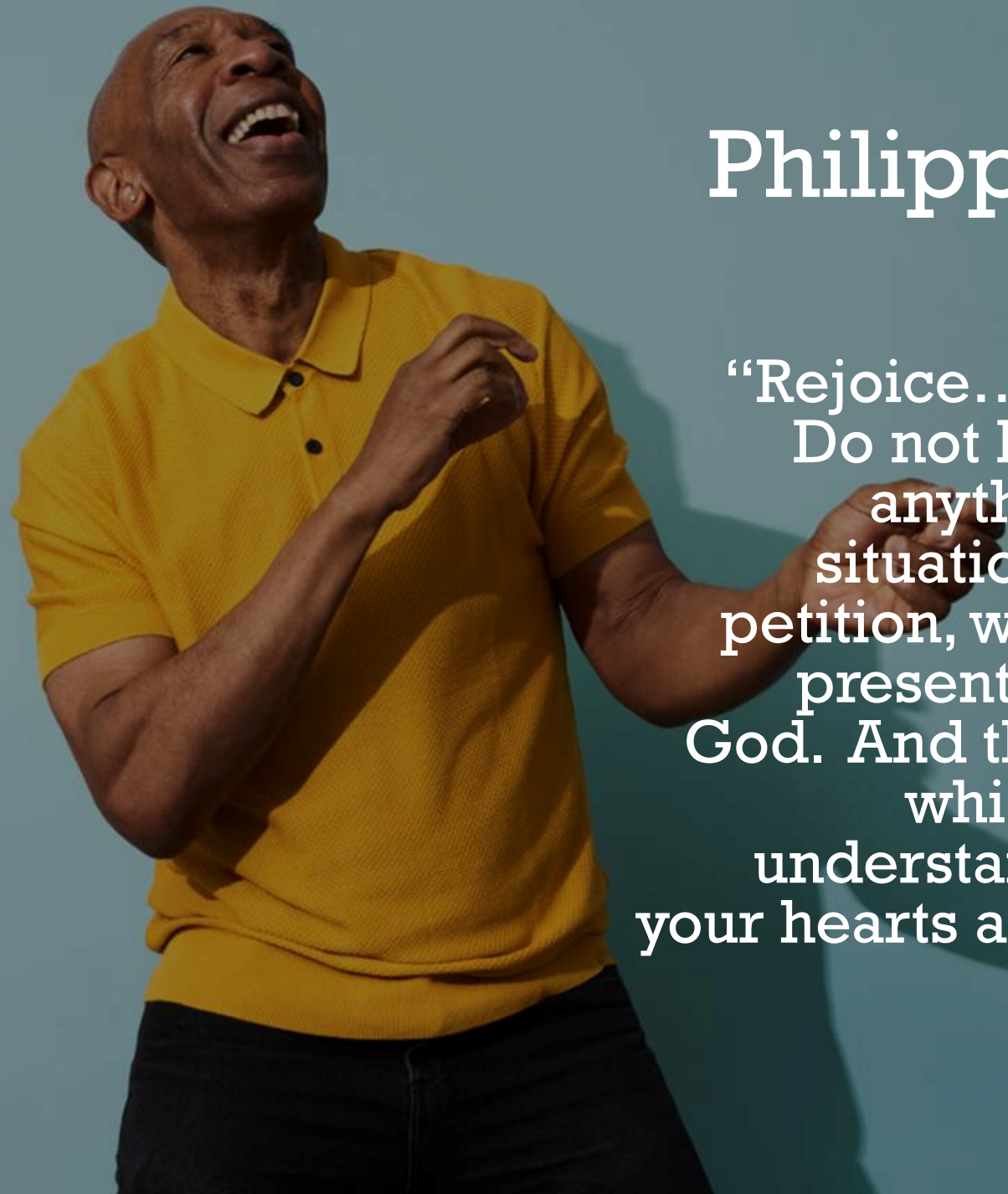
- The process and the application are absolutely similar to UK based applications. In some applications however, there is additional documentation and some additional checks but in principle the application questions are the same.

Matthew 6:31-33



“Do not worry... your heavenly Father already knows all your needs.

Seek the Kingdom of God above all else, and live righteously, and he will give you everything you need.”



Philippians 4:4-7:

“Rejoice...the Lord is near. Do not be anxious about anything, but in every situation, by prayer and petition, with **thanksgiving**, present your requests to God. And the **peace** of God, which transcends all understanding, will guard your hearts and your minds in Christ Jesus.”

Connect

LinkedIn: [@seanmtully](#)

sean.tully@actionplanning.co.uk

