BENEFACT GROUP

dsc directory of social change

Layla Moosavi Rivers

Welcome!

Writing Winning Funding Applications

Layla Moosavi Rivers



Please settle in and we'll be kicking off shortly…

Welcome from the Benefact Group

Our common purpose is to **give** all available profits **to good causes**



*DSC – The guide to UK Company Giving 2023-24

BENEFACT TRUST

BENEFACT GROUP

- Investment management
- Specialist insurance
- Broking & advisory

How we give – the Benefact Group

BENEFACT GROUP

1. **Small donations** to charities doing every possible kind of good
2. **Larger grants** to charities doing amazing work really important to our customers and communities
3. **Charity support** enabling charities to be more successful and sustainable



Visit www.movementforgood.com today to nominate

Getting in the right mindset

Key questions to think about, information to prepare, planning your outline



What is a funder looking for?

- **Good relationship with other key funders**
- Proven track record
- If you are new - show you have done your research
- **Evidence of success- Impact**
- Established and credible
- **Brand awareness**
- Press reputation
- Why you are the right organisation for the job
- Have you thought of risks and overcoming them
- Clear budget

Internal and External Preparation





Preparation is Key-Pre and Post Planning the approach

- Internal preparation: Key project information and budget
- Targeting the proposal content and style to the right audience
- Deciding how much to ask for based on research and judgement
- Getting in touch for feedback as and when necessary
- Monitoring and evaluation
- Re-pitch

Please note that applications are much more directed by the questions and word count Proposals are more of a free narrative.

Pre – Proposal Internal and External Preparation

- Understanding your organisation's vision, missions, ethics audience and positioning
- Fundraising elements within organisational strategy and Your Core Narrative
- Management team and Trustees
  SWOT and PESTLE
- Funder analysis and Income generation pattern
  Monitoring and evaluation policy
- Breakdown Different elements of your service outcomes to see how they can be defined in various funder categories e.g. improved mental health and wellbeing, educational activities to help with employment opportunities etc.



Key proposal planning words to think about (simple questions to help get you started)

WH and How questions



- Who (are you?)
- What (do you do?)
- Who (do you do it for?)
- Why (do you do it?)
- How (do you do it ?)
- How often (do you do it?)
- When (do you do it?)
- Where (do you do it ?)
- Who do you do it with?
- How (do you know it works?)

Key words to understand- Funders' Language

- Outputs and outcomes
- **Impact**
- Change and improvement for the better
- **Sustainability**
- Transformational - use funder's own language
- Clear simple message
- To be taken on a journey
- Clear targets
- **Monitoring and evaluation plan**
- **How you will spend funder's money - ROI**
- Need to motivate your funder/audience to give

Areas of assessment examples explained

Impact and Effectiveness

- Demonstrate real impact through robust assessment of information and a range of facts.
- To understand the reach and influence of the project in detail.

Innovation

- Are you doing it differently – finding new and innovative ways to tackle social issues by taking a new perspective, establishing new partnerships or taking new approaches



Sustainability

- Achieve a lasting difference, changing the way the charity can do good for the long-term

Care and Compassion

- Clearly demonstrate care and compassion for the people, places and communities they are supporting.



Don’t just Dive In- Can you answer key questions first?



What are the expected **outcomes and achievements** of the project?

Do you have a clear budget?

Core cost recovery – can you justify it all and be transparent?

How will you be sustainable?

Writing Winning Funding Applications

Do you already have funding **prospects**?

What have you committed to the project already?

Do you have a project start and finish date?

When do you need the money? Think of when the funder will get back to you.

How well do you understand the needs of your organisation?

Proposal Budget- you are still telling a story with figures



- Core services are the heart and foundation of what you do and should not be underestimated

- Core/revenue - turn what could be perceived as boring into interesting
- Capital or Project
- Core cost recovery
- Depreciation and inflation
- Pricing and packaging effectively

Telling a story

- Attracting attention
- Making your project/cause transparent yet relatable
- Thinking creatively and outside the box
- Visualisation of project/cause
- **Assume reader has no previous knowledge** – they are on a journey reading your proposal and need to visualise it





Proposals - Taking funders on a journey



What is the problem or need that needs to be met?

How do you intend to fill the gap?

Are you asking for core or project?

What are the aims and objectives of your organisation and specifically your project?

What methodology will you be using will be used to meet these aims? e.g., services, research

What are the short and long-term strategic plans and does your proposal complement that?

What have been your achievements so far?

Important Questions to Ask Yourself

- Is your organisation proposal ready?
- Do you know what you need to prepare?
- Do you know what you want and why you want it?
- Have you carried out all the necessary advance preparation?
- **What would you want to read in a proposal if you were a funder?**
- What is your story?



Proposal Outline

Executive summary or Introduction - based on proposal length
The need/problem/issue
How your organisation meets the need (fills the identified gap)
Impact you have made so far- major achievements if necessary
Details about the specific project or the most relevant bit of the organisation if it's for core funding
Statistics and facts that are relevant and make it a stronger proposal (up to date REFERENCES)
What you plan to do with the funding – your goal
How you plan to monitor and evaluate
The ASK - this can go where you feel it has more impact (start, middle or end)
Impact you plan to make - targets and intended outcomes
Summary
Appendices: case studies, testimonials that are relevant
YOU DON'T NEED TO INCLUDE EVERYTHING IT NEEDS TO BE TAILORED
CHECK THEIR CRITERIA AND EXCLUSIONS

Do’s and Don’t

Don’t

- Ignore criteria and funders interest
- Forget to look at exclusions
- Sloppy budget
- Bad editing
- Lots of Typos and bad cut and paste jobs
- Lots of different styles in the same application
- Not being clear about what you need
- Using too much jargon and abbreviation without explaining
- Unrealistic resources and time frames
- Out of date information

Do

- Tell your beneficiaries' stories
- Make your narrative up to date to reflect the current internal and external funding and economic scene
- Good testimonials or case studies (sometime videos may be required too)
- Have up to date facts and figures
- Find out what motivates your funder
- Find the right balance of emotive and factual
- Ask for what you need
- Find your style ad what works for you- its content and messaging that is key
- Have an up-to-date website funders can refer to
- Explain how you plan to monitor and evaluate
- How will the project be sustainable going forward

Why should a funder pick you?



And finally… FIVE exciting things to leave you with

1. Attend the Q&A session
2. Attend future webinars
3. For Impact: The Charity Podcast
4. Join our Movement for Good Network
5. Charity Heroes Awards

1. Writing winning funding applications – Q&A

We appreciate the importance of this subject and so have set-up a dedicated Q&A session

9 July 2024
9.30am to 10.30am
Register online - Charity Support - Benefact Group

2. Attend future webinars

- Writing winning funding applications: Your questions answered, 9 July
- Digital Fundraising: Tools and tactics, 2 October
- Positive teams: Recruitment, retention and wellbeing, 13 November

3. For Impact: The Charity Podcast

Episode1: Why are the media so wrong about charities?

Available on your favourite podcast platform or on our charity support hub – just scan the QR code.



4. Join our Movement for Good network

*"**The Movement for Good Network** brings together a group of special charities to learn, share feedback and gain access to extra opportunities and support. We want to get to know your fantastic organisations better and do more to support you!"*

MOVEMENT FOR GOOD NETWORK

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SCAN ME

5. Benefact Group Charity Heroes Awards



















Thank you for listening

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MOVEMENT FOR GOOD NETWORK

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