



Funding Applications; A Practical Guide

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Welcome from the Benefact Group

An international group of financial services businesses,
that **gives** all available profits to charities and good causes.



About Benefact Group



The UK's
4th largest
corporate donor

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



Movement For Good

Launched in 2019 with smaller and larger grants

Supported thousands of charities across the UK

2022 Movement for Good awards are now open

This year we are donating more than **£1 million**



[Movementforgood.com](https://www.movementforgood.com)



Fundraising support from the Benefact Group



Fundraising Resources

We know that raising those all-important funds for your charity isn't always easy – it requires continual effort and investment. That's why we want to offer practical support and guidance to help you fundraise successfully. Whether you are a volunteer, charity CEO, or seasoned professional fundraiser, we hope our resources will help make your charity's strategy simpler and more successful.

benefactgroup.com/fundraising-resources

Over to Layla...



The Big Questions

- 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?
- If you were a funder what would you be looking for?



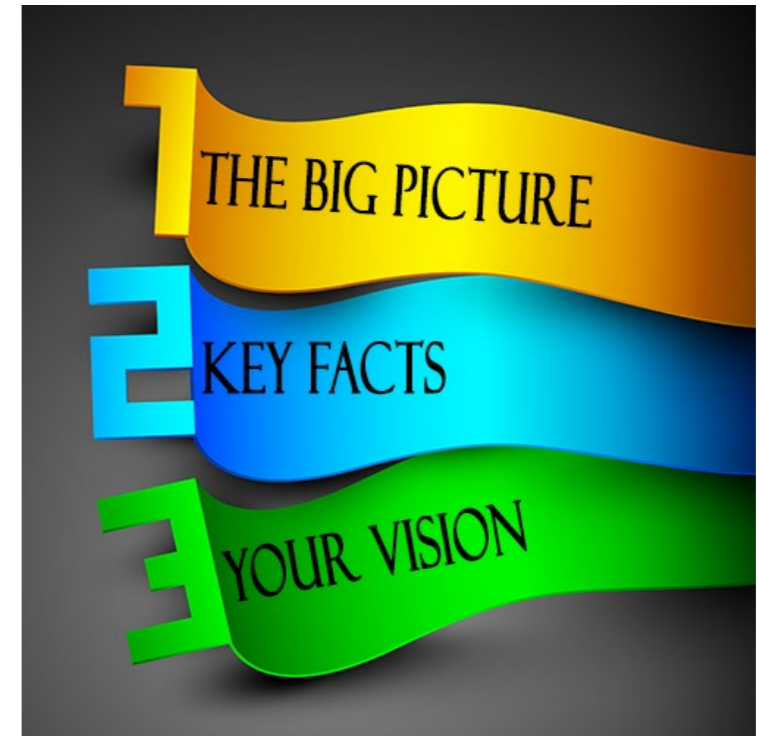
Standing out in a crowd



- Attracting attention
- Making your project/cause transparent yet relatable
- Thinking creatively and outside the box
- Visualisation of project/cause

MANAGING THE COMPETITION





Key message audience - Targeted messages to Stakeholders

- Sponsors/corporates
- Beneficiaries
- Supporters
- General funders
- Trust and Foundations
- Major donors
- Community & Event attendees
- Government funding
- Trustees
- Other



Engaging with funders

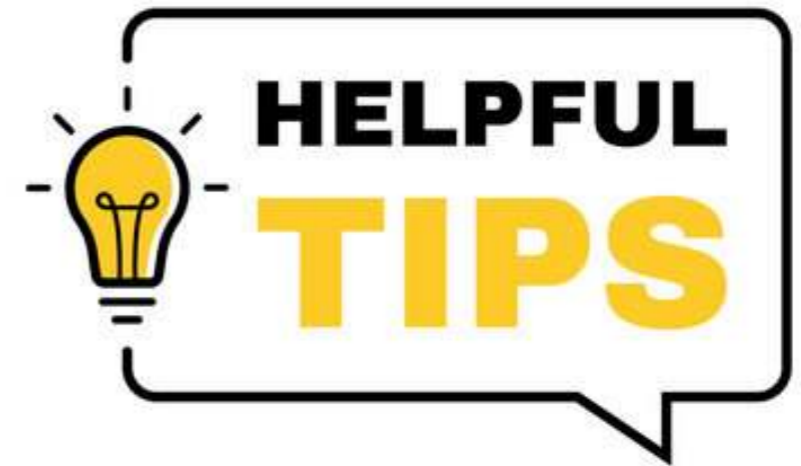
- Understanding them and doing your research
- **Find ways your leadership can communicate with funders**
- Be on top of your website and social media
- **Highlight your USP and expertise**
- Be hands on and up to date with your content delivery & move with the times
- **Always consider impact of external factors such as Covid**
- Look at what type of funders work for you at this point in time
- **Have a prospect cultivation plan**

What would I look for if I were a funder?

- **Good relationship with key funders**
- Proven track record
- **Evidence of success**
- Established and credible
- **Brand awareness**
- Press reputation
- Outputs and outcomes
- **Impact**
- Change and improvement for the better
- **Sustainability**
- Transformational

Proposal tips - understanding your funder

- ✓ Avoid jargon
- ✓ Language-length vs punchy based on type of funder
- ✓ Images where necessary and relevant
- ✓ Make reader visualise it
- ✓ Take funder on a journey
- ✓ Footnotes for references
- ✓ Name of contact



Proposal planning process

- **Internal preparation: information and budget**
- Planning the approach
- **Targeting the proposal to the right audience**
- Deciding on the content of the proposal for the right audience
- **Deciding how much to ask for based on research and judgement**
- Writing the proposal and deciding on the style and appropriate layout
- **Getting in touch for feedback as and when necessary**
- Please note that applications are much more directed by the questions and word count
- **Monitoring and evaluation**

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?

Areas of assessment to think about

- Resources
- Outcome and Impact
- Sustainability
- Innovation
- Community
- Direct reach
- Targets
- Transformational Aspect
- Evidence/Monitoring and Evaluation



Can you answer any of these right now?

- 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?**
- 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 funder will get back to you**

Key proposal planning words to think about

Motivation
Audience



- 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 ?)
- How (do you know it works?)

Organisational Knowledge



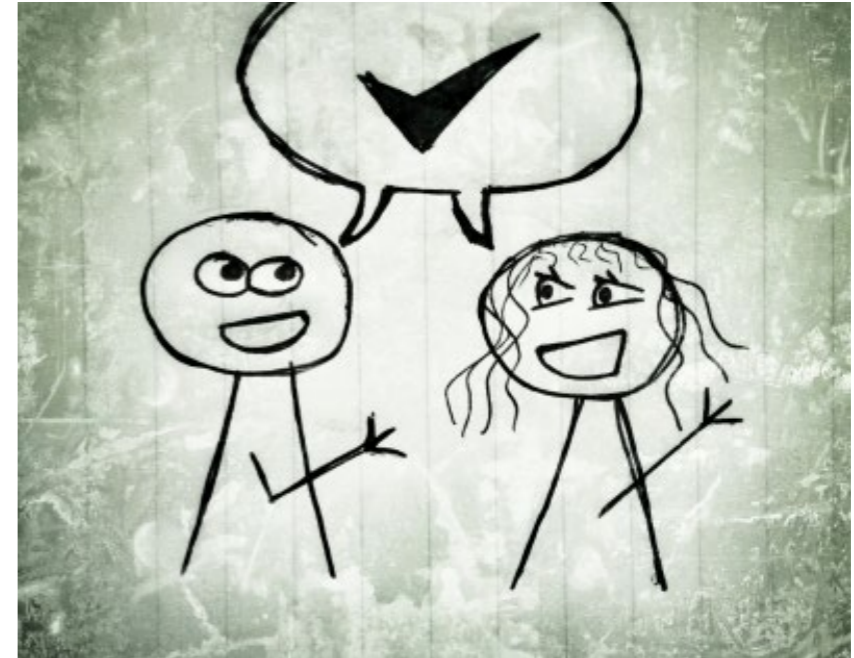
Fundraising Cycle: Internal and External Preparation



In front of an audience

Understanding your organisation

- Vision and Mission
- **Organisational & Fundraising Strategy**
- **Objectives (SMART)**
- Positioning
- Ethics/values
- Audience (Supporters and beneficiaries)



Fundraising Strategy

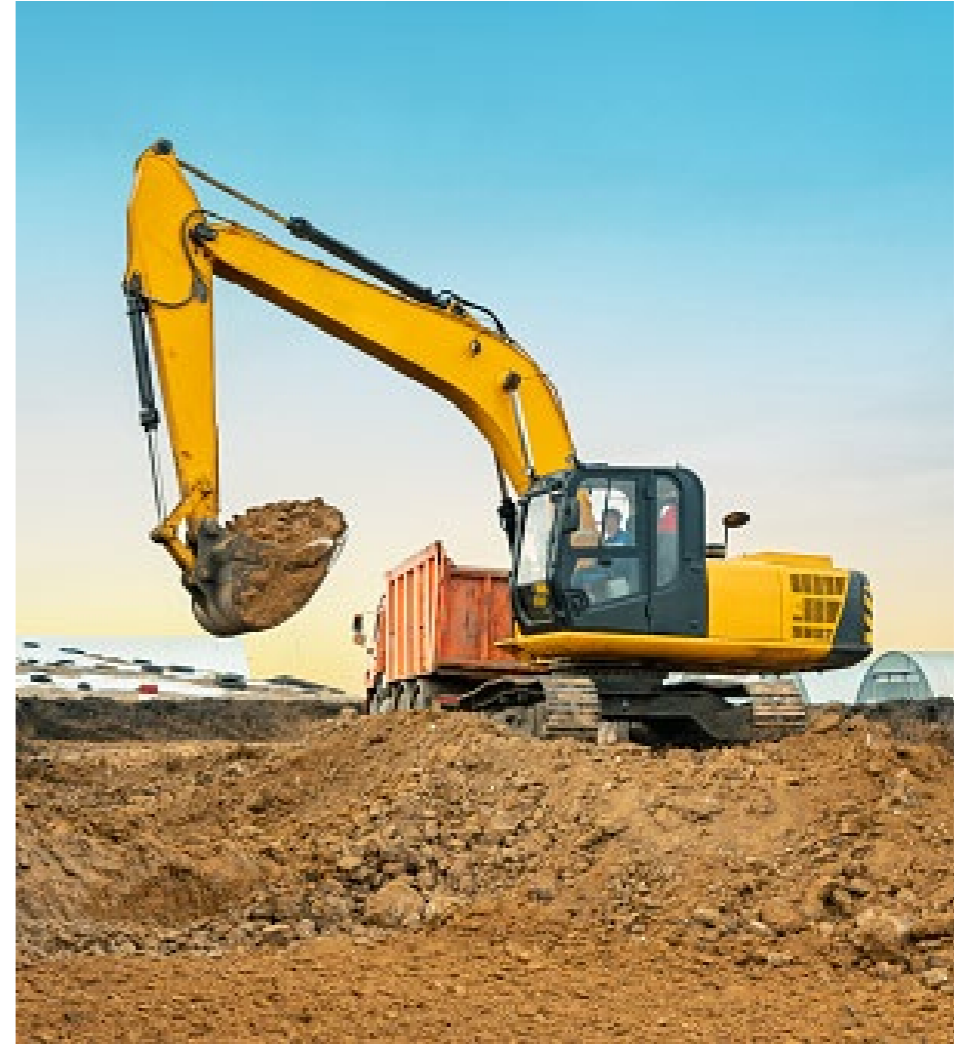
Fundraising audit (helps show a pattern)

SWOT and PESTLE

Case for support

Planning and Action

Monitoring and Evaluation



Who is your audience?

- Remember supporters and beneficiaries are usually NOT the same
- Beneficiaries are the people you support and provide services for
- Supporters are the people who are interested in what you do and may give you money



SWOT and PESTLE

SWOT Matrix

	HELPFUL (for your objective)	HARMFUL (for your objective)
INTERNAL (within organisation)	Strengths • • • • • • S	Weaknesses • • • • • • W
EXTERNAL (outside organisation)	Opportunities • • • • • • O	Threats • • • • • • T

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Case For Support - Why should they fund YOUR organisation?



Case for support elements (An internal Document)

- **Need**
- Vision/mission/values
- **Plans for future**
- Services: features and benefits
- **Unique selling points (USP)**
- Innovation, cost effectiveness, sustainability
- **How you are portrayed in the press**
- Public image and brand
- **Achievements, impacts and outcomes**
- Who you support
- **Who is your audience**
- Financial goals
- **Leadership of organisation**
- Trustees experience
- **How can donors get involved and benefit**
- Benefit to companies
- **Use of volunteers**
- Relationship with funders
- Monitoring and Evaluation

Case for Support - questions to ask yourself

- **What is unique about your organisation (USP)**
- Are there similar organisations that do what you do?
- **How does your organisation stand out and differ from similar causes and organisations or service providers?**
- What are the specific needs of your organisations/project?
- **How many people do you directly help?**
- Are you national or local?
- **If you did not exist what would happen? Very powerful concept**
- Useful statistics about the need and the problem?
- **Is there a current gap you are trying to fill?**
- Are you a leader in your field?
- **What is your objective and why do you need the funding?**

Project budget - things to think about



- **Core/revenue**
- **Capital**
- **Project**
- **Core cost recovery**
- **Depreciation and inflation**
- **Pricing and packaging effectively**
- **Core services are the heart of what you do and need to be packed effectively**

Core overhead costs

- Rent
- Salary
- Accountant
- Legal cost
- Bills
- Computers
- Photocopying
- Marketing
- Room Hire
- General expenses



Visualise (Turn boring to interesting)

Rent

What happens in that space

Staff salary

How many people directly benefit from the work carried out- **outcome**

Marketing

What **impact** does the message have

* How much is requested and how will you allocated it

Proposal content: Things to Consider

- **Length** - sometimes led by funder and your target prospect
- Think of size or project and funder
- **YOU DON'T NEED TO INCLUDE EVERYTHING IT NEEDS TO BE TAILORED**
- Executive summary- sometimes needed for a lengthy proposal
- Introduction- for a shorter proposal
- Key information within the body of proposal
- **Assume reader has no previous knowledge** – they are on a journey reading your proposal and need to visualise
- What is your story

Proposal Outline

- Executive summary or introduction
- The need/problem/issue
- How your organisation meets the need (fills the identified gap)
- **Impact** you have made so far
- Details about the specific project or the most relevant bit of the organisation if its core
- 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 it
- The ASK
- Impact you plan to make- targets and intended outcomes
- Summary
- Appendices: case studies, testimonials that are relevant



Areas of assessment

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.

Sustainability

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

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

Care and Compassion

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



More support from Benefact Group



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directory of social change

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Targeted case for support for companies

- Charity audience reach- direct and indirect
- Charity's demographic group of interest to a company
- Does the charity reach any particular demographic sectors ?
- How beneficial is brand association to a company?
- Does the charity offer any money can't buy experiences?



What can you offer a company?

- **Celebrities**
- PR
- **Target demographic/test marketing/product placement**
- Sales revenue
- **Advertising platform**
- Consortium
- **Online partnership**
- CSR and pro-bono
- **Synergy**
- Membership/access to members
- **Employee retention/motivation/recruitment**
- Corporate Hospitality
- **Brand**

