

Carmichael.



Funding your Community Group

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**Brockagh Resource Centre
Laragh, Co Wicklow**

County Wicklow PPN

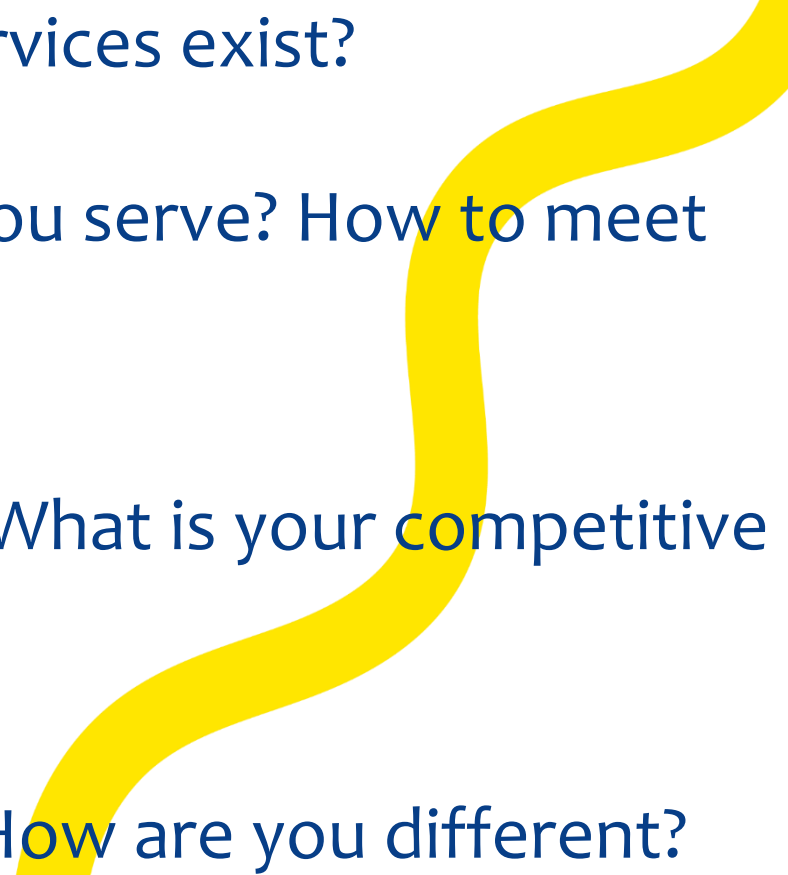
Guiding nonprofits
carmichaelireland.ie

Presentation will cover

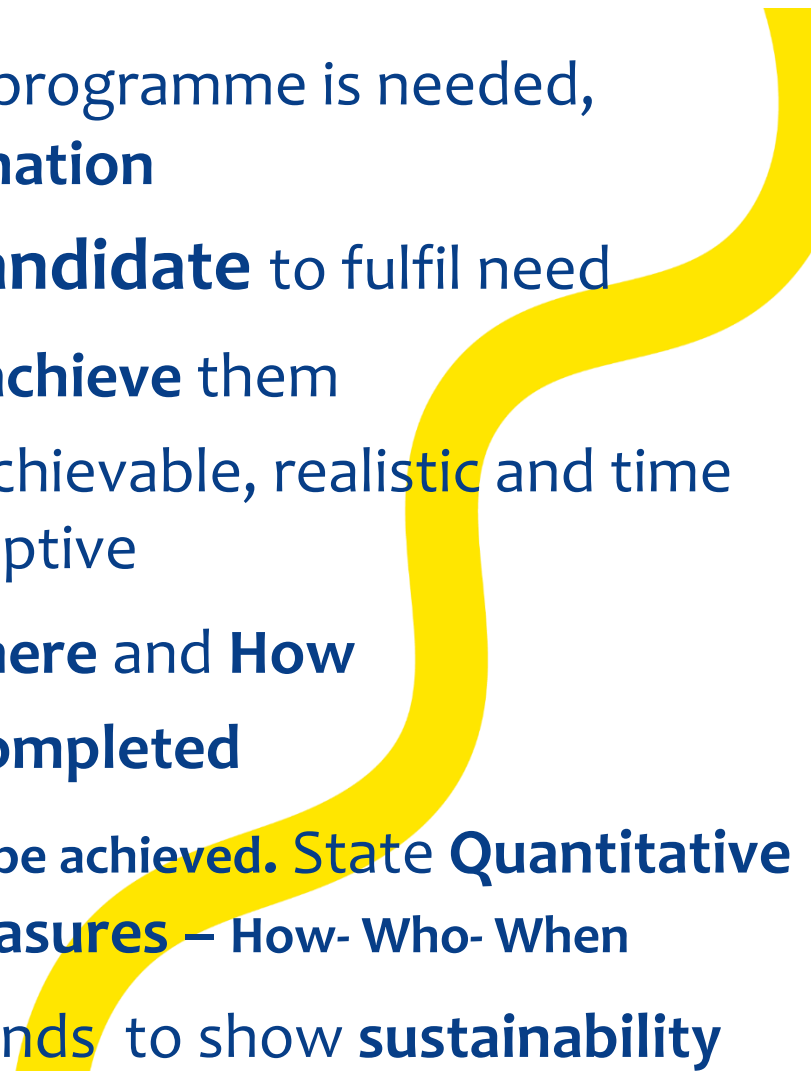
- * How to identify sources of Funding
 - * How to succeed in securing Funding
 - * Criteria to complete effective grant Applications
 - * Grant Writing Process - Ground rules
 - * Look at sample grant application forms
 - * How Applications are assessed
 - * Reporting requirements
 - * How the Grant expenditure is measured – Outcomes
 - * Common Mistakes in making Grant applications
 - * How to make A Case for Support
 - * Components of a Grant Review
 - * Preparing a Budget Plan for a grant application
 - * Characteristics of a Winning Proposal
 - * The Mix of Funding received
 - * Why Funders Give and Stop Giving
 - * Science of Fundraising
 - * Regulations, Governance, Research, Concentration, Team Effort
- 

Companies first steps


Develop a **Strategic Fundraising Plan**, to include:

- * **Vision** – Why does your services exist?
 - * **Stakeholders** – Who do you serve? How to meet their needs
 - * **Mission** – Why fundraise? What is your competitive advantage?
 - * **Strategic Positioning** – How are you different?
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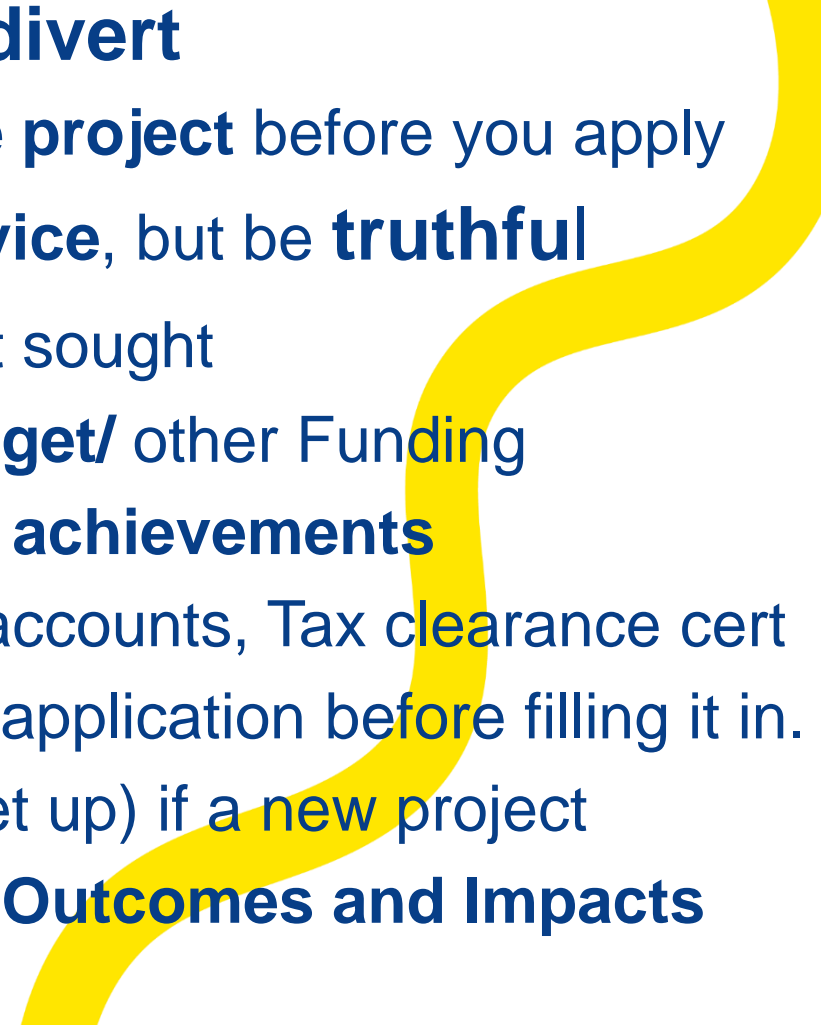
Components of a grant application

- * **Introduction** Vision Mission Values
 - * **Statement of Need:** Reason programme is needed, supported with **statistical information**
 - * Why organization is the **right candidate** to fulfil need
 - * **State Objectives** and how to **achieve** them
 - * **SMART** – specific, measurable, achievable, realistic and time sensitive. Be specific and descriptive
 - * **Who will do What , When , Where and How**
Support methods with **research completed**
 - * **Evaluation:** How Objectives will be achieved. State **Quantitative vs. Qualitative** methods. **State measures** – How- Who- When
 - * **Future Funding** After grant ends to show **sustainability**
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Components of a grant application contd.

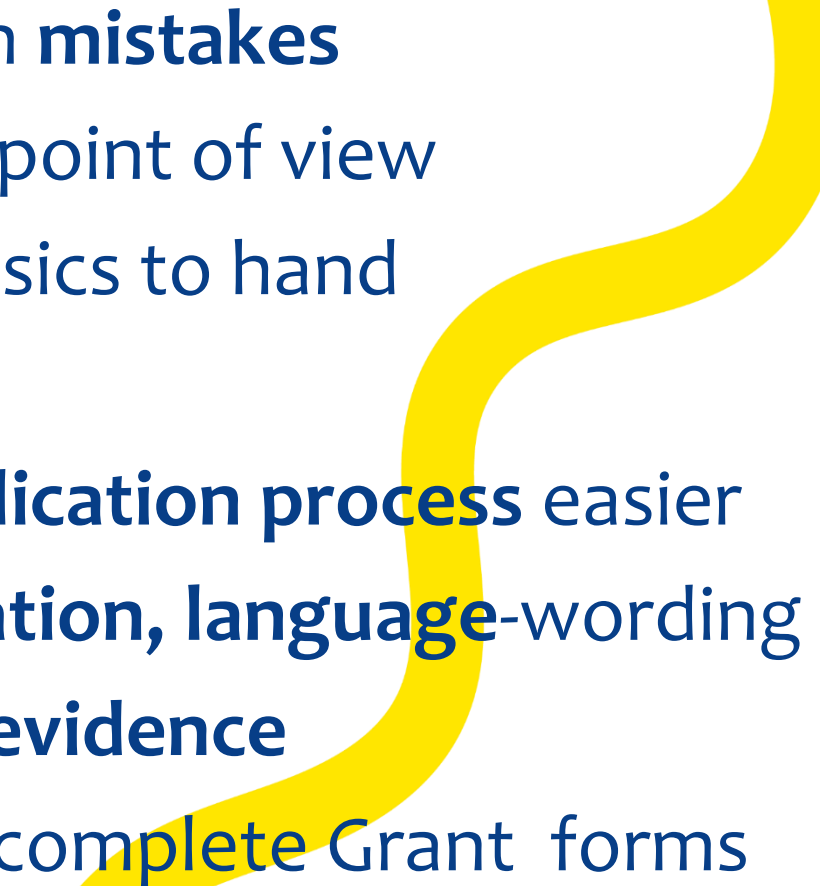
- * **Budget** Detailed budget clearly costed for project
 - * **Programme staff, Operational costs, Overheads**
 - * **Management Plan** Who will manage programme
 - * Describe **Board Structure and Governance**
 - * **Conclusion :**
 - * Restate **why** funds needed and **what** they will **achieve.**
 - * **Appendices: Support Information**
- 

Grant application Ground rules

- * **Follow instructions** and don't **divert**
 - * Be sure you are **able to run the project** before you apply
 - * Be creative, **promote your service**, but be **truthful**
 - * Show **exact purpose** for grant sought
 - * State amount required with **Budget/** other Funding
 - * Provide **Past performance** and **achievements**
 - * Provide Annual report, Audited accounts, Tax clearance cert
 - * Read **Terms of Reference** and application before filling it in.
 - * Look for **Preliminary costs** (set up) if a new project
 - * Demonstrate how you measure **Outcomes and Impacts**
 - * Look for an **exit strategy**
- 

The challenges of Funding

What Fundee's need to Know.

- * How to avoid Common **mistakes**
 - * **Understand Funder's** point of view
 - * **Prepare** – have the basics to hand
 - * Create a **team effort**
 - * How to make the **application process** easier
 - * Have clear **communication, language**-wording
 - * Make **your case with evidence**
 - * How to **successfully** complete Grant forms
- 

General criteria for application

- * What is the need for your project
- * Why you are the **best placed** to provide this project?
- * Demonstrate your **organisation's capacity for the undertaking**
- * What **model of best practice** are you using – Good Governance
- * How you apply the model in the project?
- * How it addresses the **need for your project?**
- * Are there opportunities for collaboration?
- * **What impact** do you expect to have?
- * What is your **reach** in the Community

General Criteria contd.

Strategic Fit

- * Project must fit the grant making priorities of the Funder
- * Project must serve an identified need
- * Project must have detailed, **realistic costs** & timescales

Reach

- * Project has a wide **community reach** –state anticipated **beneficiaries**
- * Project has **potential** for wider impact within the sector


Best practice

- * Create a model of working that will **provide learning** opportunities **for other groups**

Measurable Results

- * Applicants must **track programme results** throughout the duration of the project
- * Applicants must **evaluate their work outcomes**

Practical Steps for Writing Grant Applications

- * Show that the grant proposal need is **significant**
 - * Ensure the application delivers an **answer** to the **stated need**.
 - * Experience and **ability** should be **apparent** in the **application**
 - * The **proposal** should show solid **planning** & research
 - * **Research** the **grant makers**. Know their priorities and **applicant eligibility**
 - * Ensure your **aims** are **compatible** with **grant makers**
 - * Re-check **guidelines** before completing application
 - * Some Grant applications are completed on line
- 

Practical steps writing grant applications Contd.

- * Ensure **the proposal is complete**, an appropriate length and includes all required **attachments (meet word count)**
- * Ensure that the **organisation's needs** and objectives are clearly and **concisely** written
- * Cover all important criteria:
 - * project **purpose, feasibility**, community need, funds needed, applicant accountability and **competence**
- * Answer the **key questions** on the proposal checklist (provided with grant application forms)
- * Demonstrate a commitment to **equal opportunity**
- * Demonstrate the project expected **Outcomes**

American tip on **CALM** & **BUSY**

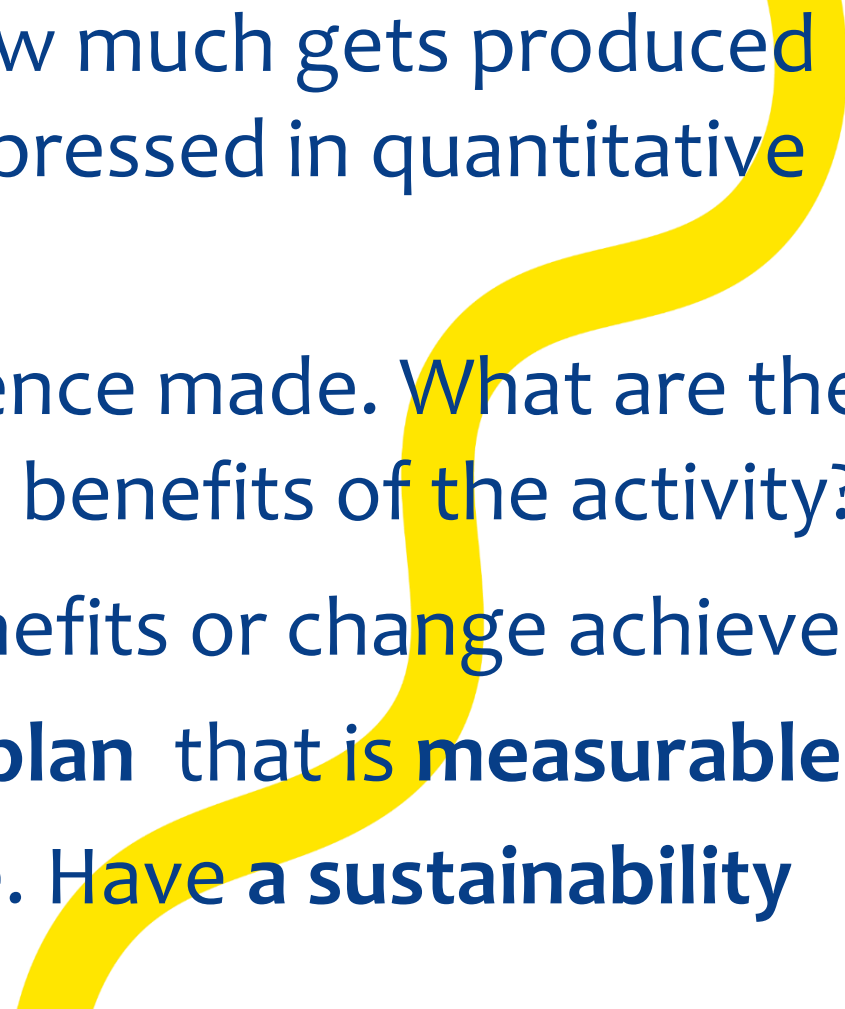
CALM means

- * You are being **Collaborative, Agile, Logical,** and **Methodical**

BUSY means:

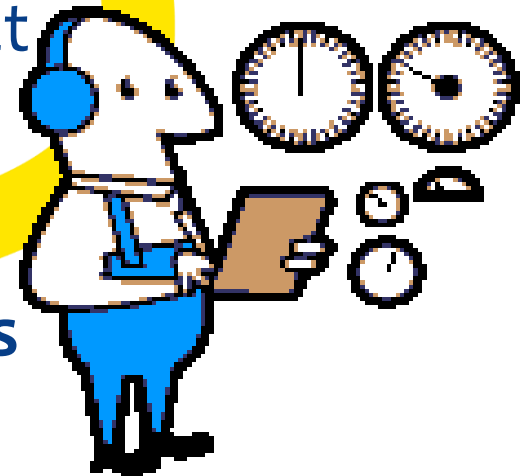
- * Letting yourself be **Bogus, Unrealistic,** **Sidestepping,** and **Yoked.**

Understand Outputs Outcomes & Impacts


- * **Outputs:** What and how much gets produced or delivered (usually expressed in quantitative measures)
 - * **Outcomes:** The difference made. What are the short and medium term benefits of the activity?
 - * **Impact:** Long term benefits or change achieved
 - * Develop an **evaluation plan** that is **measurable**
 - * Keep it clear and simple. Have a **sustainability Plan** when Grant ends
- 

How to Monitor and Evaluate Projects

- * What **information** will you collect for activities, **outputs** and **impacts** (measurable)
- * How will you **measure progress** towards meeting **aims** and **outcomes**
- * **How often** will you **evaluate** the project
- * **Who** will conduct the **evaluations**
- * How will you **use the evaluation results**



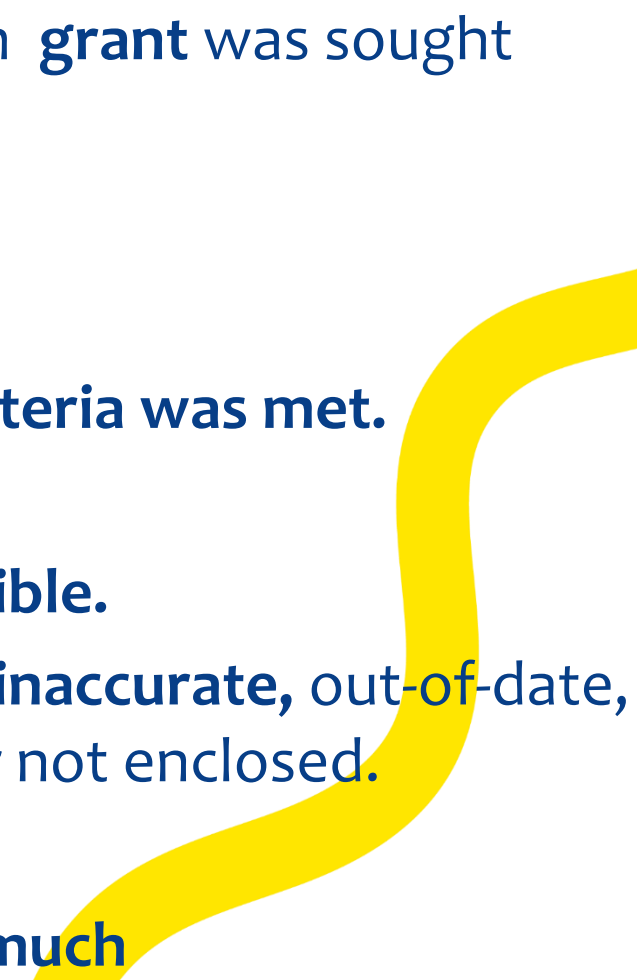
An Outcome report Guide

- * **How many people benefited** directly or indirectly from this grant
 - * **What is different in people's lives as a result**
 - * Provide a **breakdown** of all the costs involved
 - * What were the highlights of the project
 - * What were the **key lessons learned**
 - * Provide other relevant information; photos, videos, booklets , newsletters
- 


Reporting Requirements to Grant Body

- * Organisations in receipt of a grant will be required to provide **Outcome Reports** (after six months), A Foundation will also require the mention of the grant **in annual reports**, accounts and any publications
- * The Grants staff undertake **Evaluation visits** to grantees on an annual basis. Your co-operation is requested, if you are selected for a visit.

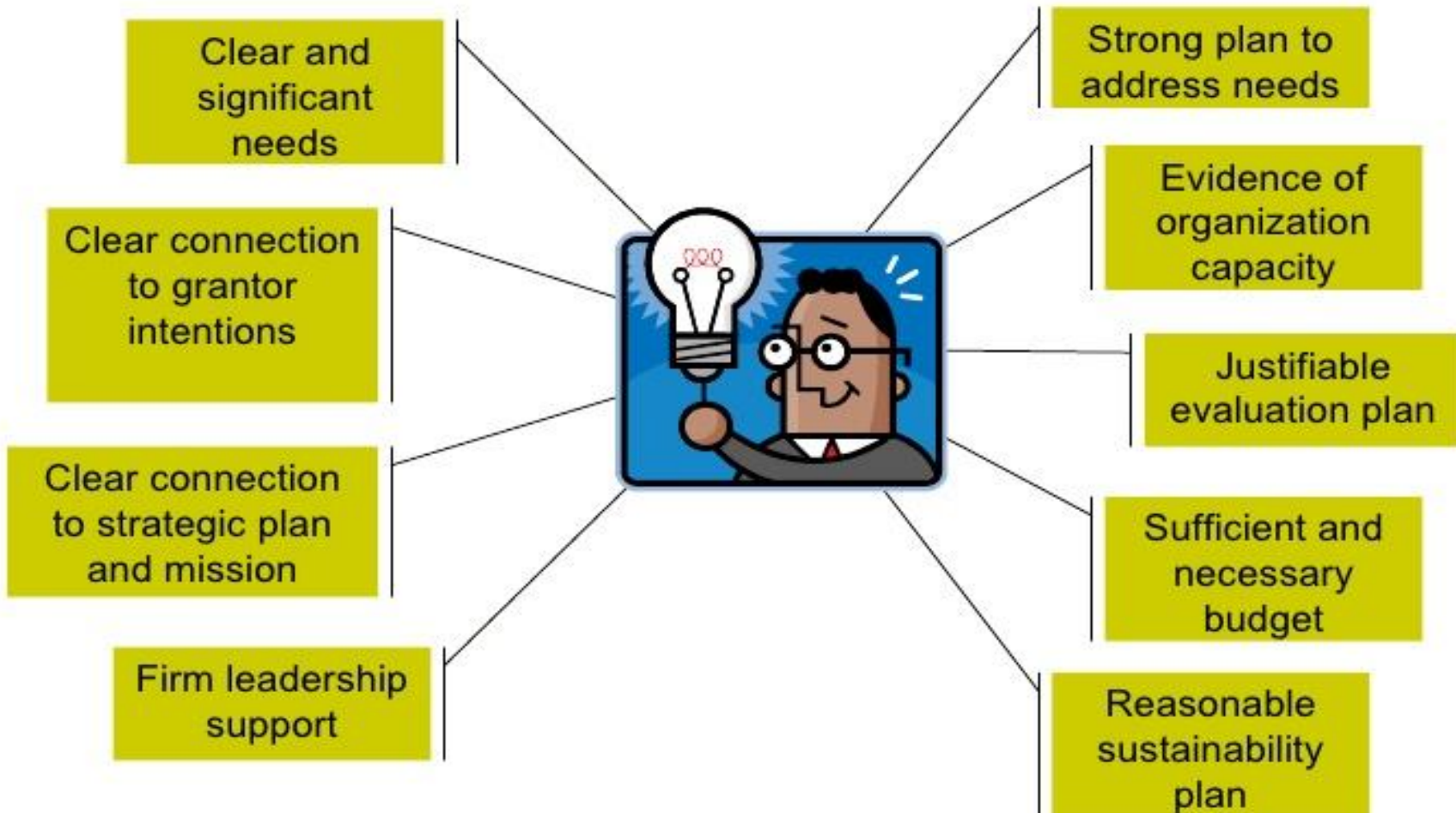
Why Grant / Fundraising Applications fail

- * All the **information** required was **not provided**
 - * Did not provide **purpose** for which **grant** was sought
 - * Proper **Budgets** not provided
 - * The applicant was **not eligible**.
 - * **Projects** were **poorly** planned.
 - * **Failed** to demonstrate that the **criteria** was met.
 - * Applicant **misses** the **deadline**.
 - * The form was **incomplete** or **illegible**.
 - * The supporting documents were **inaccurate**, out-of-date, **contradict** the application form or not enclosed.
 - * No monitoring or evaluation
 - * The applicant was **asking** for **too much**
- 

Characteristics of a winning Proposal

1. Clear and significant needs
 2. Clear connection to grantor intentions
 3. Clear connection to strategic plan and mission
 4. Firm leadership support
 5. Strong plan to address needs
 6. Evidence of organization capacity
 7. Justifiable evaluation plan
 8. Sufficient and necessary budget
 9. Reasonable Sustainable Plan
- 

Winning characteristics



What the Grant giver thinks


“A thoughtful and **honest application** always **stands out** in the crowd!.. It isn't a hurried and last minute dash to meet our deadlines with something dreamed up overnight. It is a **serious and sincere** attempt by your organisation to use its **experience and skill** to make a **positive difference** where it is **needed**” . Children in Need Grant

Golden Rules of Grant making

Grant Makers don't invest in **Products**, they invest in **People**

- * Understand what your **key strengths** are and seek out opportunities to build on them
- * Provide the Grant Maker with **Change they can Believe in!** Outcomes, Impact
- * Know **why you need the money**, and why you can **be trusted to spend it**

Tactics: Make a case for your application

- * State **the need** you are trying to address
 - * How do you **know the need exists. Provide research**
 - * Provide **scenario planning** – state what company would look like if the vision was fully implemented
 - * State major need and **verify with research**
 - * Give **Qualitative/ Quantitative findings**
 - * Identify **causes** and show a **cause and effect example**
 - * Use **simple language**
- 

Finding a Funder

- * A Foundation or State funder

Foundations

- * Broad area of interest
- * Decisions made by trustees
- * Set time lines for applications

State

Funding programme specific

Short notice **specific deadlines** Watch for **Adverts**

Reviewed and scored by panel

May require **matching fund** % or **exit strategy**

Rigorous process

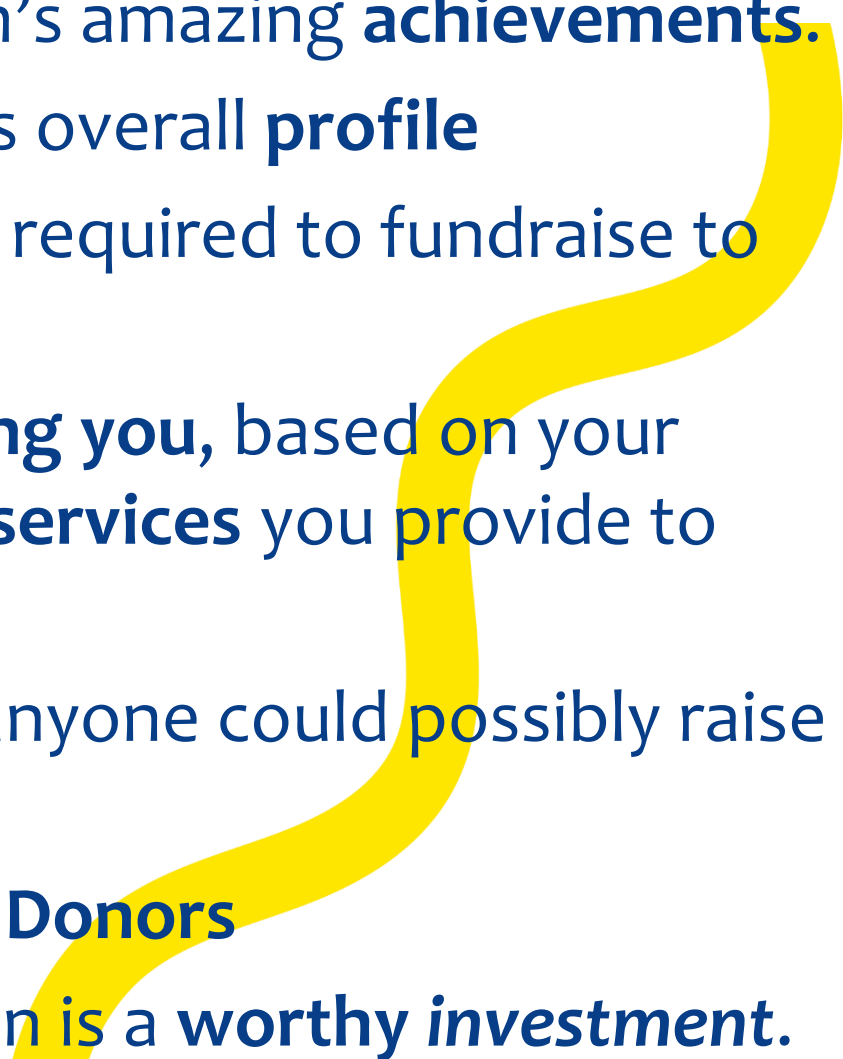


The Funding Mix of voluntary bodies

- * Corporate giving: 5%
- * Grants: 20-35%
- * Individuals: 60-65%

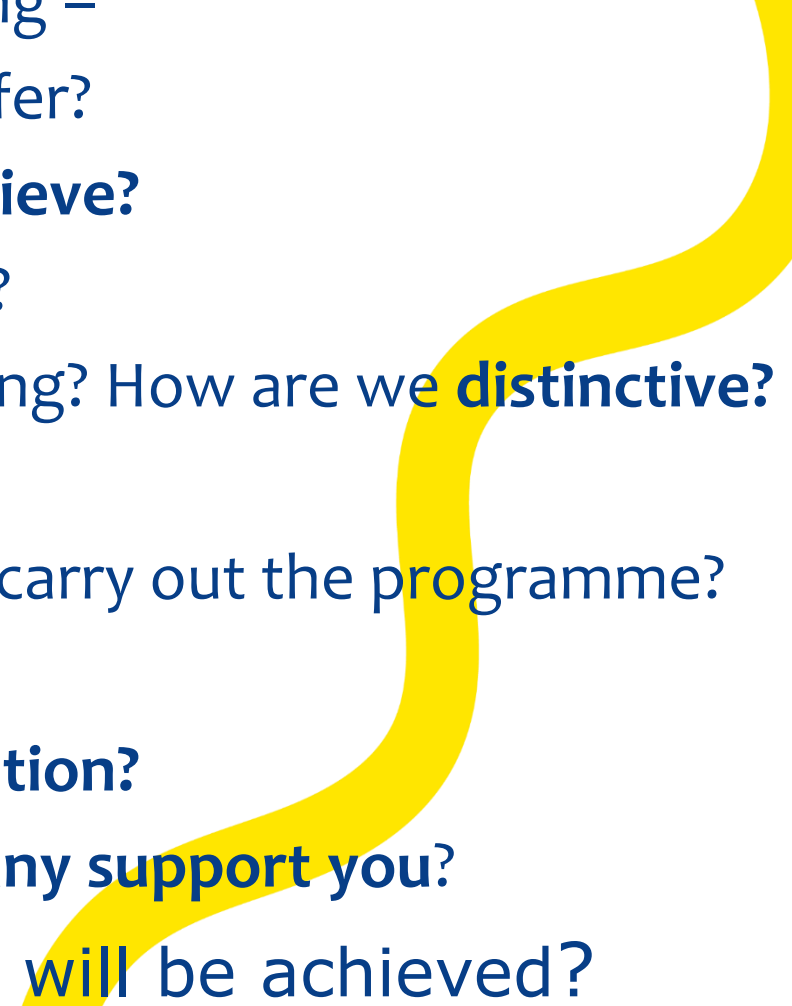
Fundraising must reflect and be resourced for this mix

What is a fundraising Case for support

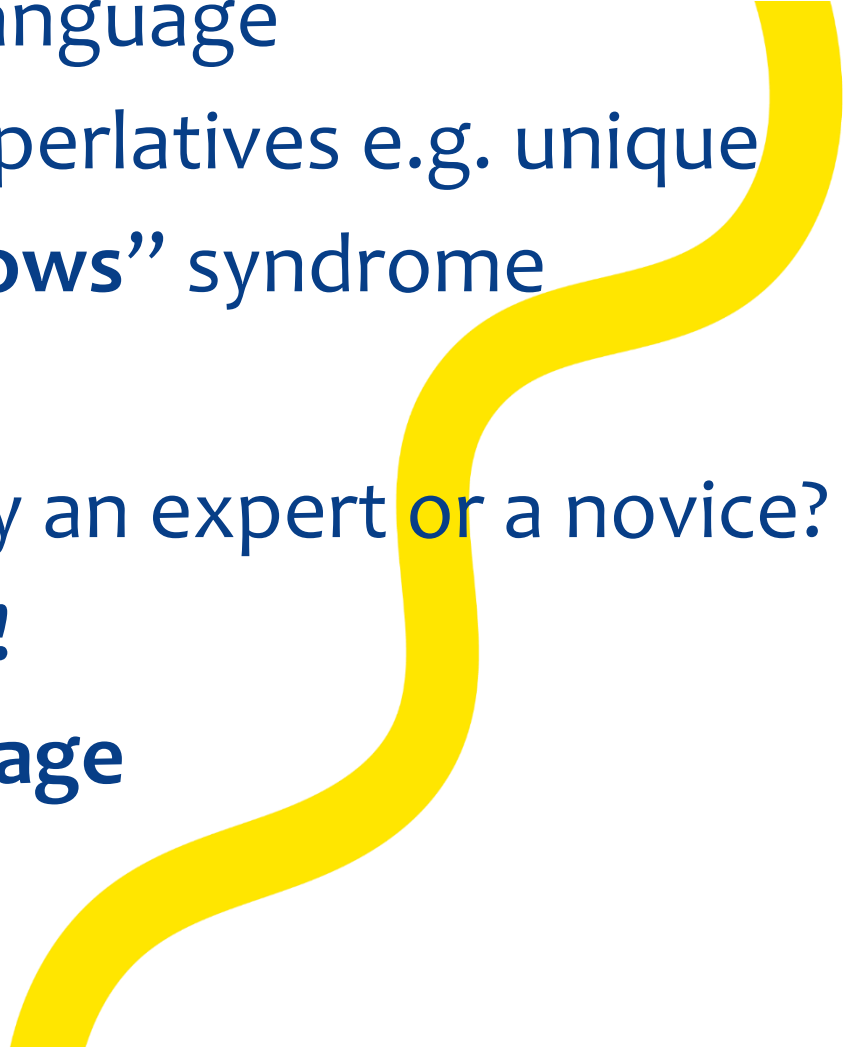
- * The **cornerstone** of any fundraising campaign
 - * **Portfolio** of your organization's amazing **achievements**.
 - * It will **raise** your organization's overall **profile**
 - * **It will have the key** document required to fundraise to meet your **mission**
 - * It is the rationale for **supporting you**, based on your **background, history** and the **services** you provide to the **community**
 - * It must **answer** any **question** anyone could possibly raise about your **organization**.
 - * Consider it a **Business Plan** for **Donors**
 - * Show donors your organization is a **worthy investment**.
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A Case for support

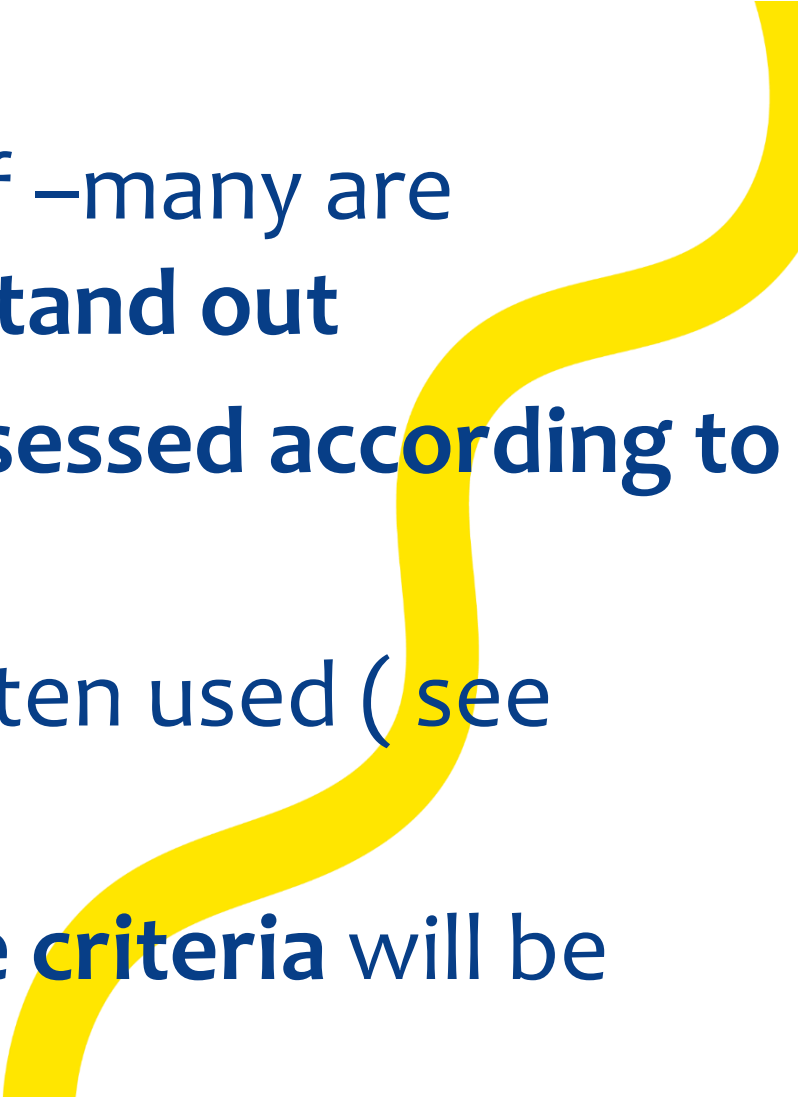
It must answer:

- * What is the **problem** we are solving –
 - * What **specific service(s)** do we offer?
 - * What **results** do we expect to **achieve**?
 - * **Why** are the **problems important**?
 - * Are **others** doing what we are doing? How are we **distinctive**?
 - * How much will it **cost**?
 - * Is the organisation **competent** to carry out the programme?
 - * How can the work be **evaluated**
 - * **Who** should **support** the **organisation**?
 - * **Why** should an **individual / company support you**?
 - * **Expected outcomes**: what will be achieved?
- 

Style and presentation language

- * Write **short sentences** in **confident language**
 - * Avoid **jargon** use simple language
 - * Avoid **unsubstantiated** superlatives e.g. unique
 - * Avoid the “**everybody knows**” syndrome
 - * Make it **clear and logical**
 - * **Write for reader**– are they an expert or a novice?
 - * Be neat, **tidy and positive!**
 - * **Easy to understand language**
 - * Write in **active voice**
 - * **Avoid** stating the **obvious**
- 

How Applications are Assessed


- * Grants are reviewed by people who are **experts in the field**
 - * The competition is stiff –many are applying, **yours must stand out**
 - * All applications are **assessed according to the criteria.**
 - * A **scoring matrix** is often used (see Handout)
 - * Those **not meeting the criteria** will be excluded
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What If, Grant is not awarded

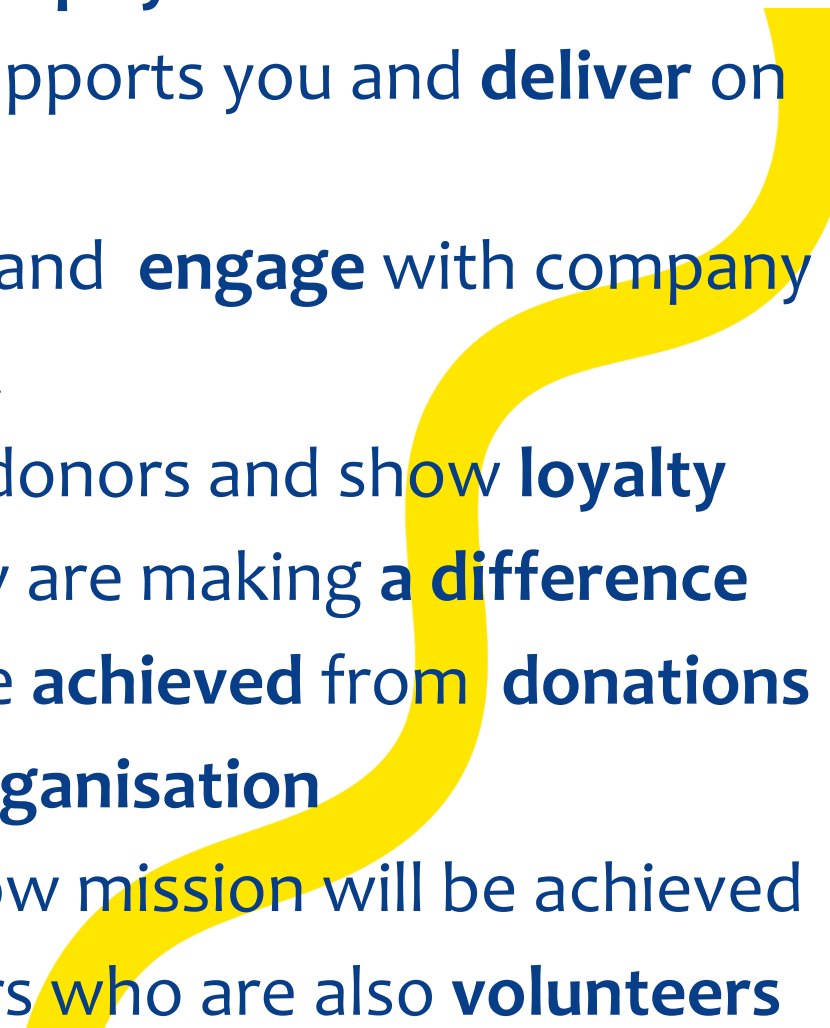
- * Talk to grantor
- * Ask **lots of questions**
- * Get **feedback**
- * Recraft and resubmit (if possible)
- * **Learn** from it
- * Assemble a good team
- * Aim for continuous **improvement**

The real work begins when the grant is awarded


Building Trust with Donors

- * Demonstrate **best practice**, good judgement and **stewardship**
 - * Adhere to **professional standards**
 - * **Train** fundraising staff or **volunteers**
 - * Look for **feedback**
 - * Communicate the **achievements** of the organisation - **relate these to the donor's contribution** where **possible**
 - * Ensure all **promises** to donors are **kept** and are **seen to be kept**
- 

Develop Donor Retention (27% retained)

- * **Thank** donors well — and **promptly**
 - * **Understand why** the donor supports you and **deliver** on their **expectations**.
 - * **Invite** donors to visit services and **engage** with company
 - * Create a donor **welcome pack**
 - * Regularly **keep in touch** with donors and show **loyalty**
 - * **Tell** them frequently how they are making a **difference**
 - * Evidence the **impact** you have **achieved** from **donations**
 - * Make them **feel part of the organisation**
 - * **Shared Beliefs** -buying into how mission will be achieved
 - * **Multiple Engagements** -donors who are also **volunteers**
- 

Why people stop giving

- * **Lack of recognition** or thanks
 - * Do not feel **connected** to the **cause**
 - * Effect of **scandals** in charity sector
 - * **Aggressive** fundraising **tactics**
 - * Lack of **transparency** in charity
 - * Very high **overheads and salaries** of charity
 - * **Downturn** in the economy
 - * Feel the non-profit is **not fulfilling** its **mission**
 - * Lose **interest** in the cause
 - * Believe non-profit **no longer** needs their **support**
 - * Feel there are **more compelling** causes
 - * Non-profit has **not** adequately **kept in touch**
- 

What gets Big fundraising Results

- * Tell your donors how you will use their money.
- * Invite donors for a **tour of your project facility**
- * Use **Compelling Imagery**
- * Give People a **Way to Stay in Touch**
- * Make a well-articulated **“ask.”**- gives an opportunity to help

Get comfortable with asking-

No begging - An invitation

“Will you help support us by participating or donating”

End with: **Message from the Chairman-**

- Show Changes that previous supporters **enabled?**
- Show where the **organization** is going in the **next year**
- Provide the **impact** the **work** will **achieve** in the **Community**

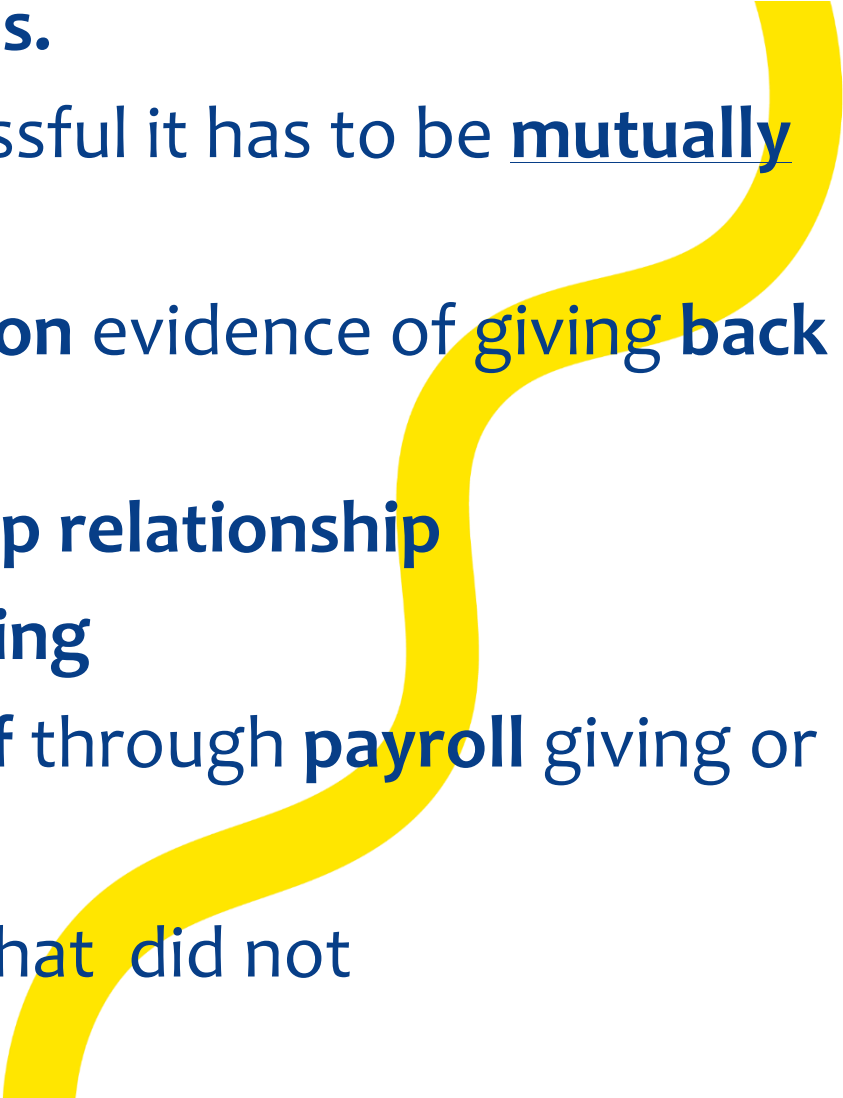
Corporate Giving

Companies give to community causes by:

- * Corporate sponsorship
- * Act as major donor
- * Support a cause in the Community where they Trade
- * Give as part of their **Corporate Social Responsibility**

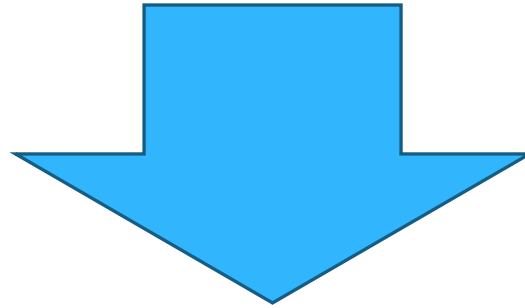
Read a potential Company's Values to see if any of these are in their policies

Corporate Sponsorship

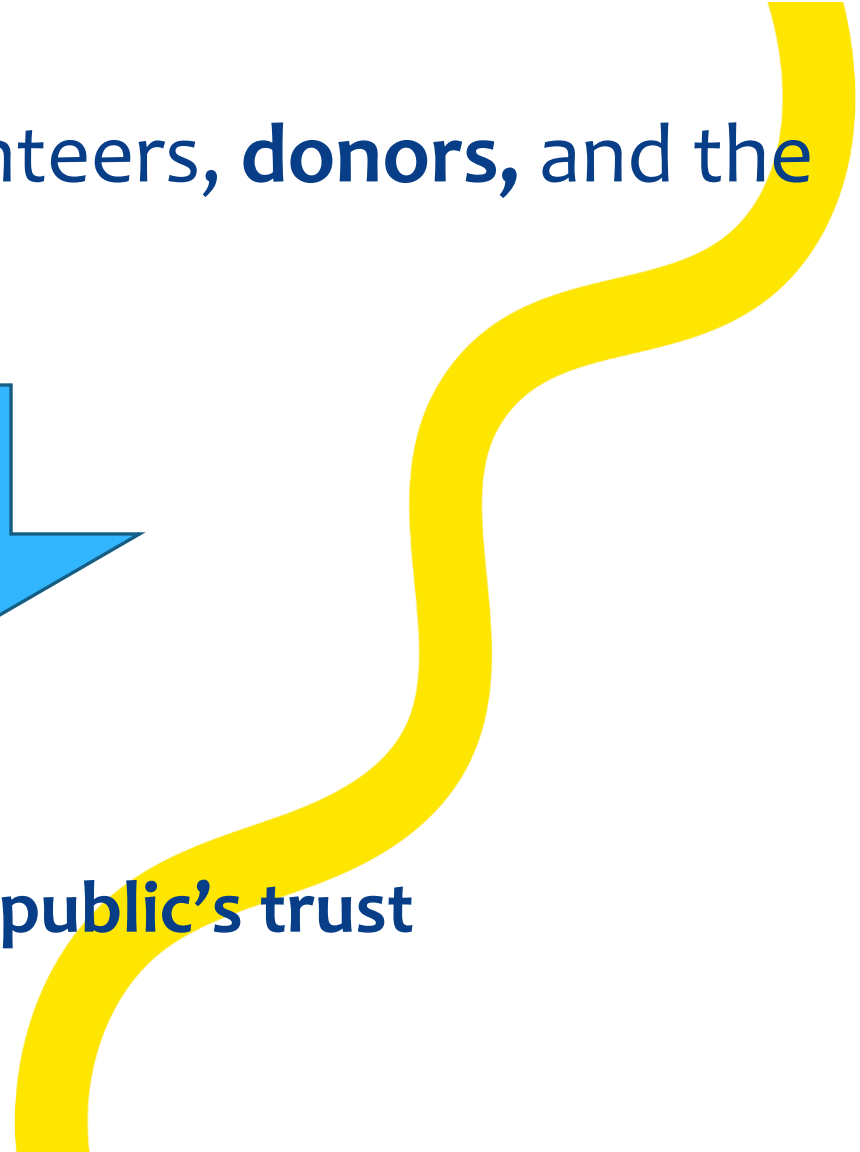
- * Find out what they're looking for, and figure how to tie into their **goals** and **objectives**.
 - * For **sponsorship** to be successful it has to be mutually beneficial.
 - * It could be for **staff motivation** evidence of **giving back to community**
 - * **Aim** to develop a **partnership relationship**
 - * It can result in **ongoing funding**
 - * Possible **donations** from **staff** through **payroll** giving or **volunteering**
 - * Assess what **Worked** and What did not
 - * Hold the **Relationship**
- 

Trust

- * **Success** of an organisation's **mission** rests on **trust**
- * The trust of **clients**, volunteers, **donors**, and the **community** are served

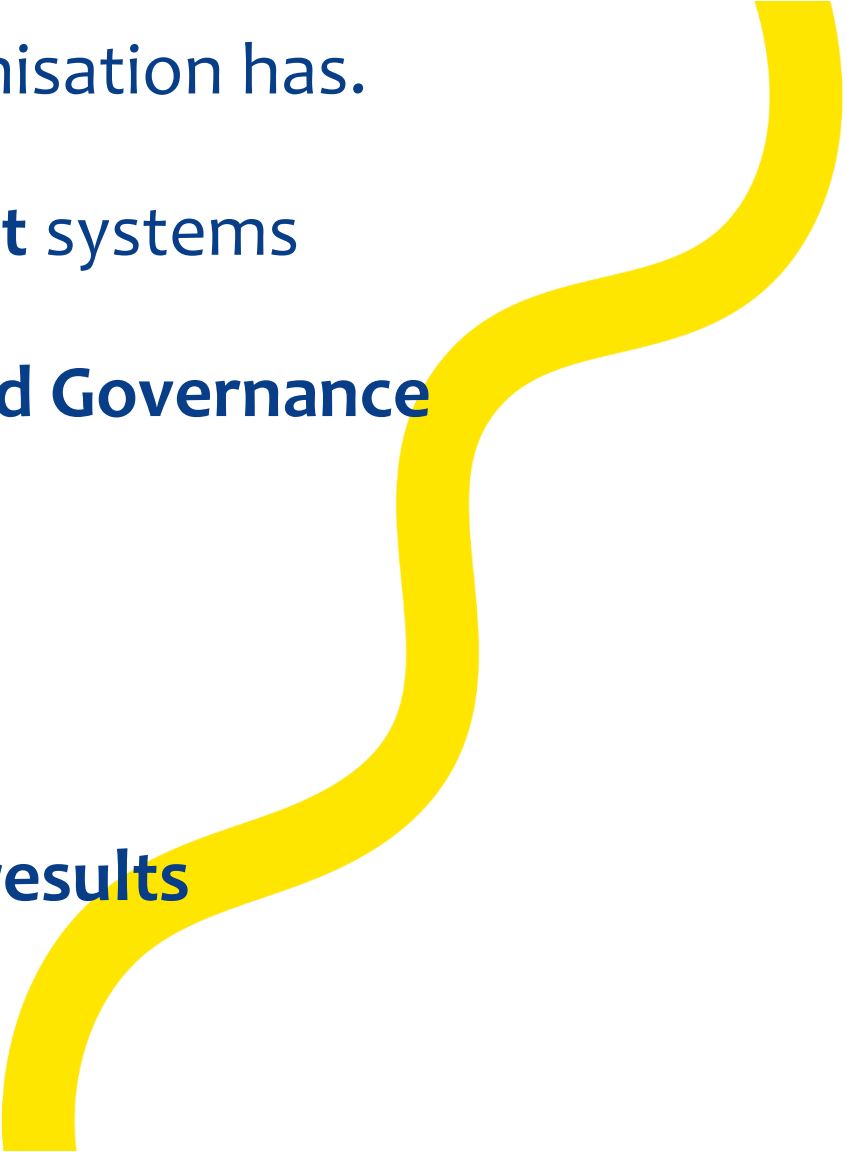


- * Fundraisers' must **guard** the **public's trust**

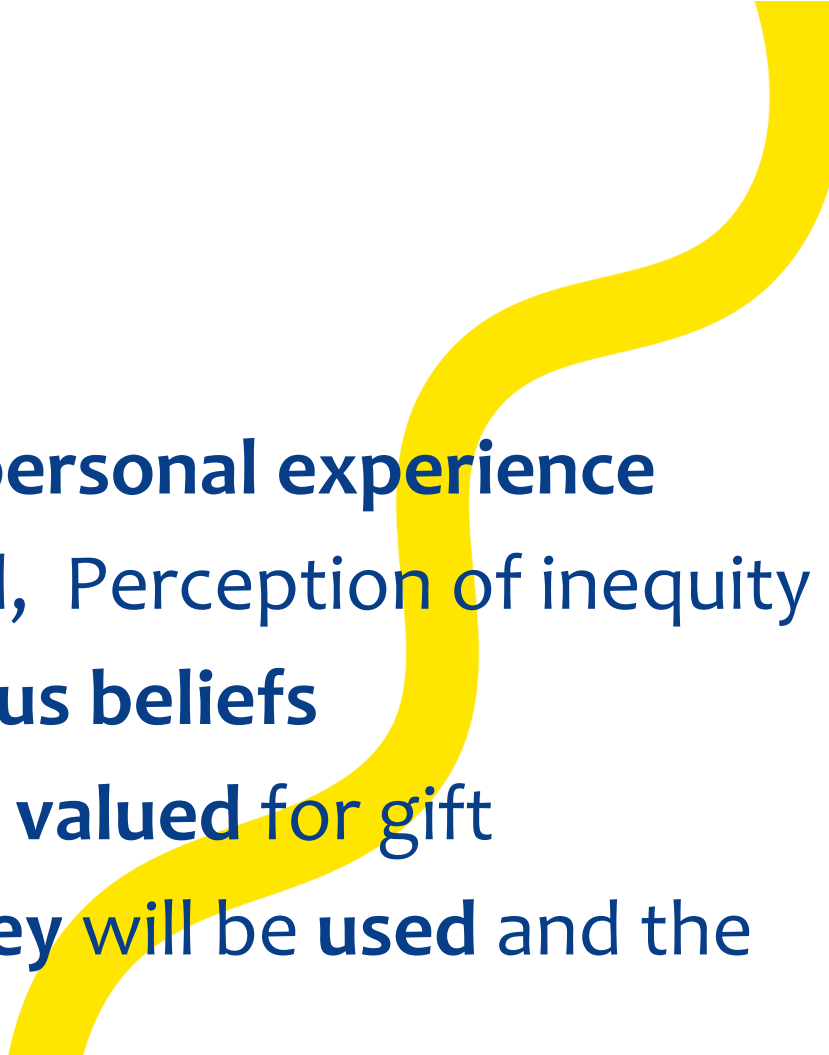


How to be successful in Fundraising

Assure **Trustworthiness, Transparency** and **Accountability** that the organisation has.

- * Robust financial **management** systems
 - * **Qualified** diverse **Board, Good Governance**
 - * **Integrity**
 - * Excellent **public image**
 - * Strong **impact** / programme **results**
 - * A **well run** organisation
- 

Why people give

- * **Altruism**
 - * **Self-interest, Egoism**
 - * **Atonement**
 - * Reciprocation
 - * **Tax breaks**
 - * **Empathy** Needs focused, **personal experience**
 - * **Sympathy** Process focused, Perception of inequity
 - * Social justice, Faith, **Religious beliefs**
 - * Want to be **recognised and valued** for gift
 - * They know how their **money** will be **used** and the **difference** it will **make**
- 

Text to Donate

A **quick convenient** and **easy** way to **donate**

Appeals to **young people**

Done **immediately** often on **impulse** from **media**

Method has given up to **40% increase** in fundraising income

Text will **promote** your **cause** on **social media**

Easy to set up by way of using a **key word**

Link to a **provider**

Billed through **mobile phone** or debit card

Secure for donor

Almost **cost free** to **organisation**

Digital fundraising- similar done on company **website**

Final Check List

- * Check the **project meets the criteria**
- * Have you **answered the project brief**
- * Have you **provided costs and do the add up**
- * Why your **organisation is best** to lead the project
- * What are the **outcomes**
- * Check the **timing suits**
- * How will you **share the learning**
- * Have application **proof read for errors**
- * Have you kept to word count

(Obtained from an experienced Foundation Grant assessor)



Errors found in applications

Very common mistakes

- * Did not read the criteria
- * Cannot clearly explain project activity
- * Timing is not aligned with grant
- * Costs don't add up

Other mistakes

- * Blank answers to questions
- * Category not ticked
- * Difficult to read/understand due to grammatical errors
- * Request amount outside funding
- * Missed deadline

CHECK YOUR APPLICATION!!



Fundraising Regulations

Charities Act, 2009

- * Specific definition of **non-cash collections**.
- * **Permits** required from police for collections.
- * Provide **Identification** including the charity registration number.
- * **Sealed Buckets** for Cash collections

Download

Guidelines for Charitable Organisations on Fundraising
from the Public

www.charitiesregulatoryauthority.ie

3 Types of Not for Profit Organisations

- * Those that **wonder** what is happening
- * Those that **watch** what is happening
- * Those that **make things happen**

Which is yours?



Useful Websites

- www.communityfoundation.ie
- <https://www.communityfoundation.ie/grants/grants-support-hub> (A video guide)
- **CFI are launching their Environment and Nature Fund on the 17th May 2019**
- www.udaras.ie
- www.charitiesregulatoryauthority.ie
- _grantsinfo@irlfunds.org

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Questions

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<https://www.carmichaelireland.ie/courses/>

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