



**Jargon warning** – this document does contain some technical funding terms; if you're unclear about the meaning of any of these terms have a look in our **Jargon Buster**.

## **1 – Make sure you're properly constituted**

This isn't difficult – you don't have to be a registered charity to apply for funding, but you do need to have a group of people signed up to pursue a charitable purpose, with a committee, a governing document and a bank account. You won't be able to get charitable funding if it's just you and your idea.

See our Step-by-step guide to setting up a charity for further guidance.

## **2 – Be clear about what you want**

Get your members and committee together to discuss exactly what it is you need to take your organisation forward. Look at the charitable purposes laid out in your governing document and stay focused on them. Plan ahead. The Lottery report that many grant applications fail because there isn't enough evidence of forward planning.

Don't just chase the money! Applying for funding just because it's there is likely to side-track you into doing what the funders want and you could lose track of your original aims.

## **3 – Consider other sources of funding first**

Even if you're sure that you need a grant, independent fundraising demonstrates initiative and commitment to potential funders. If you can show that local businesses, members of your organisation, local people or anyone else has donated money to your cause, it will give funders confidence that you're serious about your aims.

Look in our **A-Z Guide of Fundraising Ideas** for things to do to raise money. You can also use websites – either through your Facebook page or similar, or by setting up an online fundraising page like Just Giving ([www.justgiving.com](http://www.justgiving.com)) or Local Giving ([www.localgiving.com](http://www.localgiving.com))

## **4 – Partners and stakeholders**

'Stakeholders' are people who are involved with your organisation in any way – beneficiaries, members, suppliers, NHS, Police or Local Authority officers that work with you, similar voluntary organisations, local businesses... Look to these people to find potential partners for your project. Having other people on board will give you fresh

ideas, you can share skills and knowledge, and having a wider range of organisations involved will give funders confidence in your project.

Don't forget to keep track of things that supporters have donated – equipment, resources or their time. You might be able to use this as 'match funding' in application forms.

## **5 – Where to find your grant**

Once you've sorted out your idea and partners, it's time to find your grant!

There are literally thousands of funders out there. Whatever the aims of your charity, there will be something you can apply for.

In the current economic climate (June 2013) public sector (NHS, Local Authority, etc) funding is limited and Lottery funding is becoming harder to get, but there are still many charitable trusts out there with money to give away so don't panic!

Start with local knowledge – ask your local public sector agencies like the NHS if they have any money left to support your project. There may be trusts or foundations in the area that you can apply to – ask the CVS, Advice Link etc. Local grants are often easier to get because they have a more limited target area, but they may not be publicised on national websites. Don't forget your Area Forums and Councillors.

Also, consider asking local businesses. Supermarkets and larger organisations will have money for community projects in the area, and small businesses may make a donation, particularly if they are very local and/or could be involved in the project in some way.

The internet is a great place to find funding; you can just Google for grants or go to free funding sites like Funding Central ([www.fundingcentral.org](http://www.fundingcentral.org)) , or specialist paid-for sites like Grantfinder. Contact us for a free one-to-one Grantfinder session or come to one of our drop-in sessions.

## **6- Check your eligibility**

If you think you've found the right grant, check again! Grant applications often fail simply because they don't meet one of the basic requirements laid down by the funders.

All funders will clearly lay out in their documentation or on their websites the overall purposes of the grant. Look at these purposes, and be sure what you want to do fits with them.

Then check the criteria – it will say what type of organisations can apply for the money. There may be restrictions about location, size of organisation, whether or not you're a registered charity, specific types of organisation... so you'll need to be sure that your organisation meets all the requirements. Check the target beneficiaries too – funders

looking to give grants for disadvantaged people, for example, frequently find there's no clear evidence of disadvantage in the application.

Most funders will also set out a list of 'Exclusions' – things they won't fund. These might include: revenue funding, religious organisations, animal welfare, political groups, national organisations... Exclusions are a bit random, so be sure to check them.

Finally, contact the funders. They exist to hand out money, so they'll be happy to listen to an outline of your proposed project and tell you if and how it would fit their outcomes. Talking to them first not only ensures you're on the right track, but it also raises their awareness of your organisation and starts to build a relationship with them, which can be useful when it comes to monitoring and/or further funding.

## **7 – What you'll need for the application form**

So, if you're sure you're eligible, what do you need?

First of all, you'll need enough time. Check the deadline for the application, and unless you're very experienced in bidwriting, don't try to do it the night before it's due! You'll need to gather together facts and figures to make your case, and get other people to look at it. A small application will take a week or so, and a large bid will take much longer.

Many grants are only available for registered charities, but you can only be registered with the Charity Commission if you have an annual income of over £5,000. Don't worry if you're not registered – there are still plenty of grants for smaller charities.

You will need to provide some or all of the following documents:

- Constitution or other 'governing document'
- Bank account details
- Annual accounts
- Health and safety policy
- Children and vulnerable adults policy
- Insurance
- Volunteer policy
- Project/business plan

Don't worry if you haven't got all of these; they may not be relevant to your organisation, and if they are, we can provide templates here at CVS that can be easily tailored to your organisation's needs. Also, the application process for many grants has two or three stages, so you may not need to provide actual copies of documents at the first stage so you may have some time to get them.

You'll need to find out if there's an application form. Not all funders have one – some simply ask for a two or three page letter explaining what your project is about. There are pro's and con's to this – it gives you the freedom to clearly express your passion and

dedication to the project, but you'll need to be extra careful checking the outcomes and criteria to be sure you're putting the right things in, as you won't have questions to guide you.

Generally, there will be an application form, and you'll have to download it off a website. This lays out exactly what the funders want to know, but it can restrict the amount of space for each answer, so spend some time writing and editing to make sure you've got concise paragraphs that contain all the relevant information and no 'padding'.

For some grants the application process is online-only, so you'll need to look at the questions first and prepare them on a Word document or similar, then paste them onto the online form.

## **8 – Main parts of the application**

So, what will you need to put into the application form? Well, it depends to some extent on the specific grant. Smaller local grants generally require less information than a national grant. However, most application forms will require the following at some point:

**Check the criteria and exclusions** – We've already gone through this in Section 6 above, but it's so important we've put it in again. Lots of applications fail because they've just missed some basic point about eligibility or exclusions – it's such a waste of time and effort to complete the form and have it rejected at the first hurdle.

**Evidence the need** – you'll need to show that the money you're asking for is desperately needed.

The evidence must be clear and convincing – aim for a combination of hard facts and emotional appeal. Statistics about the grimness of Blackpool, for example, are useful background context (check out our **Blackpool Statistics for Applications** factsheet) but you'll also need more detailed evidence – such as:

- Medical evidence of how your project will improve conditions
- Personal testimonials from members or service users
- Analysis or comments from experts in partner organisations
- Examples or case studies from elsewhere

Sometimes funders will ask 'What would be the consequences of not receiving the grant?' – it's an opportunity for you to show how vital your project is, but also that your organisation is robust enough to cope without the funding. Funders will be unwilling to throw money at an organisation they think might fold soon.

Note that if you're asking for money to fund a specific project, you'll have to demonstrate the need for that project, not just for your organisation overall.

**Match the outcomes** – look at the outcomes – that is, the overall aims – of the grant you’re applying for and make sure that your application form is focused on achieving this aim.

Often, when filling in application forms, you can cut and paste paragraphs from one form to another, but the text will almost always need ‘tweaking’ to ensure it’s aimed clearly at the right outcomes.

Outcomes can be vague – ‘Improving Health and Wellbeing’ – or very specific – ‘Reducing waste and promoting recycling in Lancashire’. Obviously if your project’s aims match those of a specific grant you’re in luck – there will be fewer applicants so you’ve more chance of success – but you will have to clearly show that your project does match.

### **Have a plan!**

As we mentioned in section 2, bids often fail because the project is not well planned, with unclear milestones and delivery methods. Some bids show how projects fit strategies and outcomes, but have no detail of how the project would be delivered on the ground.

Make sure the people who will be actually using the building, equipment etc are involved in the planning – the added detail they provide will show potential funders that you mean business. Even a bid for a computer or a vehicle needs to show how it would be stored, insured and used and by whom. Has the group thought through all the implications of taking on this new piece of equipment, vehicle, post, premises etc?

**Detailed costings** – make the money you’re asking for as specific as possible.

A good way of failing to get a grant is to look at the maximum amount available and just apply for that. There are some situations where you can do this - it may be that you need the maximum amount as part of a combined bid for a large project – but generally you’ll need to be specific about what you need and how much it costs. Get quotes or costs off the internet, and show how that money will benefit the project.

Finally, have you handled this amount of money before? If you’ve had grants for £2,000 in the past and suddenly apply for £300,000, you’re not likely to be successful unless you’ve got partners who *do* have the experience.

**Show sustainability** – funders often want to know that when their funding stops, the project will be able to continue independently. To make them confident that this will happen, you need to show that the project will do some or all of the following:

- Give volunteers or staff the skills to continue providing the service
- Raise the profile of the organisation so that membership and/or income will increase

- Establish alternative future sources of funding, for example kitchen equipment allowing refreshments to be sold
- Increase the capacity of the organisation so that it can provide chargeable services.
- Develop networks or partnerships that might lead to joint projects in future.

If there isn't a 'sustainability element' to the bid, then you'll need to show that you've got an 'exit strategy' such as signposting beneficiaries to an organisation that can provide similar services.

**Clear monitoring** – The amount and complexity of monitoring depends largely on how much money you've asked for, but you'll need to provide details of what the grant has been spent on, what activities have happened as a result of that money, and how it has achieved an improvement in your – and the funder's – aims. Make sure your monitoring shows benefit to your beneficiaries, not just to your organization. Examples of monitoring requirements include:

- Receipts for purchase of items or services
- Number of users/beneficiaries
- Descriptions of what difference the grant has made through surveys or focus groups
- Photographs of happy people benefitting from the grant
- Personal written testimonials

Wherever possible, monitored outcomes should be SMART – specific, measurable, achievable, realistic and timebound.

Don't forget to make a note in your diary of the date by which you need to submit a 'follow up/evaluation' report. Allow time to collate the relevant information from all parties.

## **And finally – a list of top tips and common mistakes from the Lottery:**

### **Top tips**

- Check that you are eligible for the funding programme you're planning to apply to.
- Check that your project is suitable for the funding programme you're applying to.
- Check whether there is a deadline for applications.
- Thoroughly read the application pack and guidance notes.
- Speak to someone from the funder before you apply – this is especially important if you have any concerns or if you don't understand any part of the application pack.
- Enclose all required supporting documents with your application, such as your constitution, bank account details, annual accounts and make sure they all have the group's name on them.
- Ask a helper organisation to read through your application and check that they understand your project before you send it.
- Keep a copy of the application form so that you can answer questions about it when it is assessed.

### **Common mistakes**

- Completing the application form without having read through the whole pack and making sure that you can provide all the required information
- Not taking a photocopy of your application for your own records
- Submitting additional paperwork that is not relevant to your application
- Submitting an unrealistic project budget. All costs should be researched before you apply.
- Forgetting to make sure that someone from your group can be contacted during office hours.
- Not providing all signatures requested in the application.

#### **Written and compiled by Blackpool, Wyre and Fylde CVS.**

If you think any further information could usefully be added, or that anything in here is unclear, please let us know.

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