Dorset Community Action

Planning to get ahead with Funding – Session 2

July 2015

1. Introductions & Learning Outcomes

Who are you and what would you like to get out of today? What are the common problems in the room?

My issues:

Learning Outcomes

By the end of this half-day training workshop you will be able to;

- **Describe the impact of their project / organisation**

  (inc; Need, Aim, Outcomes, Tracking & Activities)
- **Link project tracking to Business/Project Plan**
- **Understand how to put all of this information together into a funding bid**
- **Recognise what a successful funding letter / application looks like**
- **Know what to include in a successful funding bid**
- **Understand the secrets to success in writing funding applications**
- **Know what other support is available**

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2. Describing the Impact of Your Project/Organisation

Why aims, outcomes and indicators make the difference to your funding success.

Terminology:
Aim – is a brief statement of the overall purpose of your project.
Activities – are the tasks, actions or services that take place in your project to achieve its outcomes.
Outcomes – are the specific changes that result from your project.
Indicators – are a sign that the outcome is happening.
Indicator Level – how you will measure progress towards achieving your outcomes.
Final Indicator Level - how you will measure to what extent a particular outcome has been achieved over the life of the project.

Why are these key to a successful funding bid?
Most applications will ask you to set out the main activities that you will carry out in order to achieve your outcomes, along with an explanation about who will perform the activities and the timescales involved. Funders will be checking that the quality of your plans will ensure delivery of the identified need to your beneficiaries. They want to make sure your project plans are sound, the project will be delivered on time, your organisation will become more sustainable and communities will be stronger as a result of their funding.

Where do we start?
The following is a stepped process which starts you on the path of effective project planning.

Firstly aims and outcomes help focus everything that you do. They explain the changes your project will bring about to meet the needs you have identified. They explain why the project should be funded.

AIM – LINKED TO NEED(S)

Write one aim for your group/organisation – use one sentence to describe something that you can achieve or at least influence strongly over the course of your project.

Check your aim reflects the need that you have identified and sums up the overall purpose of your project in one sentence. *For example: 'To improve the social integration of older people in the community by reducing isolation and enabling them to maintain their independence'*

OUTCOMES & IMPACT

Write one outcome – a specific change as a result of the project (you may have more than one) use words of change such as **more, better, less** improved. *For example: 'Older people report feeling less isolated as a result of accessing a range of social activities'*

Check your outcomes link logically to the need you identified and limit it to a manageable number.

Once you are clear about your aims and outcomes, you will need to work out how you will show the change your project is achieving over time. So you need to understand and identify the signs of change and measure them. These are called **indicators**.

INDICATORS / MILESTONES (Tracking)

Write one indicator that could be used to track progress. Use words like 'the extent of' 'the ability to' and 'the amount of' f*or example: 'The number of older people feeling less isolated'*

Check your indicator describes the signs that will tell you if a change is happening. What methods will you use to track your indicators and finally check your indicator is realistic.

An Indicator level might be: *'50 older people are accessing new social activities.'* You also need to demonstrate the overall change you wish to make.

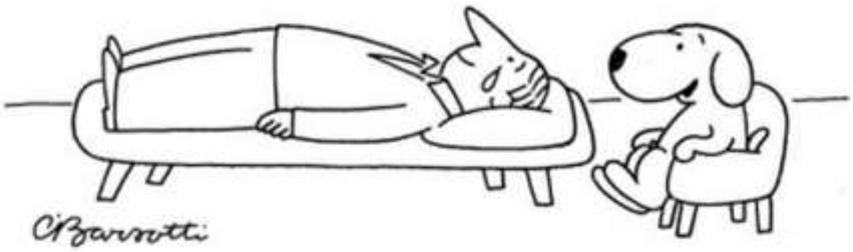
Your final indicator level might be *'a total of 250 people report that they feel less isolated by the end of the project'*

Now you are clear on your aims and outcomes and the indicators that will be used to measure your change you need to specify what will be done, how it will be done and who will do it and when. This will enable you to achieve your outcomes and it will also form the main content of your project planning and determine the resources and budget that you need to run your project.

ACTIVITIES

Write one activity that specifies what tasks, actions or services that you need to take place in your project to achieve its outcomes. Use words of action such as: to provide, run, organise or produce. For example: *hold weekly lunch club for at least 30 beneficiaries.*

Check each activity has a direct link to one or more of your outcomes. From your activities you can develop a project plan showing what you will do, how and by when in order to achieve the outcomes.



"Well, I think you're wonderful."

LINKING TO BUSINESS PLAN

Have a look at the Business Plan template used in Session 1 (or Handout "Business Plan Template")

- **Where does "Impact" come in a Business Plan?**
- **Where do you show "Indicator Levels"?**
- **Why does this need to be in your Business Plan?**

3. Putting It All Together

GOOD IDEA / IDENTIFICATION OF NEED (EVIDENCE)

↓

AIM = WHAT YOU HOPE TO ACHIEVE

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OUTCOME = WHAT YOU WANT TO CHANGE (aim / need) – INDICATORS (measures/incremental/milestones)

↓

ACTIVITY REQUIRED (to meet aim) / OUTPUTS (what you delivered)

↓

IMPACT = CHANGE THAT HAS OCCURRED (link to need)

AIMS & OUTCOMES

- Does your Aim reflect the need you have identified and sum up the purpose of your project in one sentence?
- Have you used words of change (eg; more, less, improved, increase, decrease - maintain) to describe your outcomes?
- Have you stated what will be different by the end of your project?
- Do your OUTCOMES link logically to the NEED identified?
- Do your Outcomes describe CLEAR, SPECIFIC & REALISTIC CHANGES?
- Have you limited your Outcomes to a manageable number?

TRACKING PROGRESS

- Have you identified at least one indicator for each outcome?
- Do your indicators describe signs that will tell you change is happening?
- Have you described the scale or level of the change you wish to achieve at KEY POINTS (Milestones) during the project, and by the end of the project?
- What methods will you use to track your indicators?
- Are your indicators realistic?

www.biglottery.org.uk/funding/funding-guidance

NOW HAVE A LOOK AT THE FOLLOWING EXAMPLE.

AN ADVICE SERVICE PROJECT - Example

NEED

People in this rural area find it difficult to obtain advice about their rights, particularly people on low incomes. This is for a number of reasons including: confidence levels, literacy levels, poor levels of understanding about rights before a crisis point, lack of affordable transport to local services, a lack of time or childcare when doing two jobs, mental health issues related to joblessness. Money and debt problems are a source of stress that affect beneficiaries' quality of life and mental health.

Evidence

The information provided below is an example. When referring to consultation or research, you should include dates to show when it took place (ideally within the last two years to ensure it is up to date) and clarify the source of the evidence.

- Feedback given to voluntary sector advice agencies from 200 clients, collected by Chesterton Citizen's Advice Bureau throughout 2010 and 2011, includes information about the type of advice received previously and the extent to which it was useful, the main difficulties in accessing advice services and how they were overcome.
- A review of services in the area during 2010 and 2011 by Derbyshire County Council confirmed that people find it difficult to obtain advice about their rights, particularly people on low incomes.
- In June 2011, Derbyshire County Council gathered feedback from a focus group of local stakeholders including 10 local people, 5 advice agency staff and 2 solicitors from surrounding areas to talk about possible solutions to the gap in services. It concluded that existing services needed to be extended to rural areas and should be easier to access.
- Over the last six months, advice agencies in Derbyshire have reported a 30% increase in enquiries and a waiting list of 40 clients.
- A survey of 110 people who do not currently use rights services was conducted by Top Survey UK Ltd in January 2012. They were reached through other local services, such as benefits agency, playgroups, housing federation etc. This provided information about what kinds of communications would work best to help them find out about services and the main barriers that might stop them using those services.
- Focus groups carried out by Chesterton CAB in February 2012 with 30 potential beneficiaries showed that they needed help with financial management, debts and welfare because these issues were causing them stress and anxiety that was affecting their quality of life.
- GPs and health professionals in Derbyshire have seen an increase in numbers of people experiencing stress in 2011, due to their financial situation and report that they do not know which agencies to refer them to.

- Derbyshire County Council's 2011/12 Sustainable Community strategy (see Chapter 2: Recommendations) references a need to focus on improving access to advice and support for vulnerable groups.

AIM

People in households with low incomes in this rural part of the district will have a better quality of life as a result of improved access to good quality rights-based advice.

OUTCOME(S) FOR THE PROJECT

- Increased amount of income generated by advice services for people on low incomes that will improve their economic well-being
- Increased capacity of advice services to deal with additional clients in rural areas, giving people on low incomes better access to advice
- People on low incomes will experience reduced stress and anxiety, as a result of financial advice leading to improved well-being

Indicators / Milestones / Tracking Progress

Outcome	Indicator	Indicator level	Timescale
Increased amount of income generated by advice services for people on low incomes that will improve their economic well-being	The amount of new income generated by the project for those with low incomes	15 in year one and 30 in each subsequent year demonstrate increased income as a result of advice given	By the end of each project year
		15 in year one and 30 in each subsequent year access at least one new benefit as a result of advice given	By the end of each project year
		A total of 95 service users on low incomes will report increased income as a result of advice given	By the end of the project
Increased capacity of advice services to deal with additional clients in rural areas, giving people on low incomes better access to advice	Number of new clients seen by advice services	100 in year one and 150 in each subsequent year access the service more than once	By the end of each project year
		100 new clients in each year are referred to the service	By the end of each project year

Outcome	Indicator	Indicator level	Timescale
		Advice service offers advice to a total of 425 more clients on low incomes in rural areas	By the end of the project
People on low incomes will experience reduced stress and anxiety, as a result of financial advice leading to improved well-being	Level of stress reduced by accessing regular advice	15 in year one and 30 in each subsequent year report reduced stress and anxiety levels as a result of accessing the service	By the end of each project year
		15 in year one and 30 in each subsequent year demonstrate indicators of increased mental well-being such as reduced sleeplessness, alcohol intake and a reduction in doctor visits as a result of accessing the service	By the end of each project year
		A total of 95 service users on low incomes report increased well being as a result of advice given	By the end of the project

ACTIVITIES (Outputs)

- 10 Recruit staff,
- Complete business plan with marketing strategy
- Money advice drop-in sessions held twice weekly
- Outreach surgeries held monthly within health and community centres in the local rural area
- Recruitment and training of 10 volunteers to provide advice to their peers
- Assess quality of advice through quarterlypeer review and an annual survey

Learning

The project learned that certain types of approach worked better than others in different settings, so these were tailored during the second year to maximise impact. Some groups of service users were more likely to provide feedback than others on the service and so consultation methods had to be reviewed to reach the more marginalised service users.

https://www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding/project-planning-examples/advice-service-example

CHUNKING EXERCISE

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4. Getting the Information & the Balance Right

ELEVATOR STATEMENT EXERCISE

Elevator statement/Sound bite - a short, sharp summary of the business of your organisation that could be delivered in the time it takes to go a couple of floors in an elevator.

Elevator Statements Top Tips:

- When preparing your elevator statement think hard about;
  - what you stand for
  - what are the messages you want to use that reinforce that idea
  - a couple of the best examples of the work you have done.

Elevator Statement Exercise:

- With that information in your mind, answer these 5 questions;
  1. Who am I? (introduce yourself)
  2. What business am I in?
  3. What group of people does our organisation service? (be specific - do you have a niche?)
  4. What is our USP (Unique Selling Point)? What makes our service different?
  5. What benefits do our customers derive from our services?

- Practice delivering your elevator statement.

- Keep time of delivery down to 30 seconds.

WRITING A SUCCESSFUL BID

IT DOESN'T HAVE TO BE A FAIRY STORY!!!

5. Secrets to Success in writing funding applications & letters

UNDERSTANDING THE CRITERIA OF GRANT-GIVING BODIES

Read the guidelines very thoroughly – these are statements of fact ie THE RULES. It wastes everybody's time to presume they can be negotiated.
Funders will <u>never</u> accept applications after the deadline.
If you are not sure if your project meets their "rules" – ASK first!

Before you even think about writing an application or letter to a funder, read the **guidelines** extremely thoroughly. Go through it line by line to make sure you meet all the **criteria**. There will often be a list of 'what we do fund' and 'what we don't fund'. Check both.

Some funders have very broad criteria, some are very specific. If available, look at their reports and website information to look at other projects they've funded. Don't waste time by taking long-shots, if they say they don't fund groups outside of Somerset, they don't. Call them if you are unclear about anything – but read all available information first.

GET YOUR INFORMATION RIGHT

Remember that funding body staff are as busy as you and – as you're asking them for something and not the other way around – they won't be impressed if you expect them to research your project to get the facts that they need.

Applications are a means of communicating what a charity does and what in particular, it requires money for. Bear this in mind and come to the point quickly.

Writing your application or letter – suggested structure; pulling together some of the key information from this course:

- Project title
- Proposal summary
- Introduction – who you are **(What is your elevator statement)**
- The problem or need **(What are the needs of your beneficiaries and how do you know they have such needs?)**
- What you will do **(What is your aim and outcome)**
- How you will do it **(What activities might you carry out)**
- How will you know if you've been successful **(What indicators might you use and over what timescale)**
- How much you need to do it
- How you will get the money
- The request
- Why the donor might be interested
- Where the money will come from in the future
- Attach accounts / annual report
- Offer future visit
- Signing off

General Points

Don't use initials or abbreviations for anything – write everything in full, at least the first time it appears in your text.

Always give specific numbers, not percentages, of;

- beneficiaries of your service
- users of your facility / product
- frequency of your service / meetings / visits
- how many more people need what you're offering.

Remember that you're competing for funds with equally deserving causes. Trying too hard to impress a funder is not helpful to your cause – especially when most people will be doing the same thing. So -

- Be passionate but not over-emotional.
- Don't make emotive statements or unsubstantiated claims.
- Be realistic – don't provide a shopping list of needs.
- Only ask for funds for something for which you can provide evidence of need.
- Use the right language – don't use jargon or fussy / unnecessary words. But also don't resort to being too formal – you could end up tying yourself in knots!
- Pay attention to grammar, handwriting and spelling so that your application can be clearly understood.
- If the guidelines state a specific number of words / characters to be used then don't exceed it.
- If applying by letter and no length is stipulated, be sure not to exceed 2 sides of A4.

EXERCISE – RECOGNISING A GOOD FUNDING LETTER

Look at the example letter given to you for your group. Feedback Positive Comments & Negative Comments – "Would you give them money?!"

GET THE DETAILS RIGHT

> Once a second rate application has gone in the post there will be NO opportunity to put things right / improve it / add documents – your application will end up in the wastepaper basket.

The Envelope - Postal details correct / up-to-date, full address, correct postage.

The Correspondent - Research who your bid should be addressed to. Find out the name of The Clerk to the Trustees. Use the correct title and spelling of contact name.

The Date - Check. Especially important if you're 'cutting & pasting' from other bids.

The Format - Never submit an application using a different format from the one detailed.

The Signature - Many are sent with no signature. Some are sent with no contact details at all.

The Enclosures - What documents were required? Accounts (correct year), constitution, policies, photos. Are they enclosed?

The Double Check - **Always** get at least one other person to check the application. **Always** take a photocopy of the application and everything you send with it.

GET THE TIMING RIGHT

Trust funds are run by ordinary human beings – trying to reduce their frustration and exasperation is bound to help them look more favourably at your application.

Check that the funding stream is currently open and accepting applications.

Check if there is a deadline date for applications and make sure that your application will be received BEFORE that date.

Send your application by special delivery if necessary.

Phone to check the application has been received.

Find out and note any ‘expression of interest’ stipulation made by the funders.

Check how often and on what dates Trustees meet and find out how long before the meeting they need to have received applications.

Keep the potential funder up-to-date with any significant changes that occur during the time that your application is being processed.

GET THE MONEY – KEEP THE MONEY – GET MONEY AGAIN

‘Charities manage to find time to write asking for money in the first place, so surely they have time to jot down a few words of thanks? Saying thank you should be considered an integral part of fundraising’. *Hilary Blume, Director of Charities Advisory Trust*

Immediately acknowledge receipt of the grant, always in writing but personally as well where appropriate.

Claim the grant efficiently by following the procedure and time scales stipulated. Cash the cheque immediately.

Comply stringently with any follow up requirements ie reports / evaluations etc. Make sure you’re able to use the money within any set timescale.

Say ‘thank you’, this is an elementary courtesy. Never send a thank-you letter with a request for money.

Work hard to build a relationship with your funder. (Most trust money is given to groups who the trust already knows, likes and trusts with their money).

Get the funder involved with your group, send them news of the project, include photos, invite them to visit.

Keep efficient records of which funds you have applied to, when you applied, how much you received and when you can apply again.

STRESSED-OUT BY A GRANT DEADLINE, CARL SOOTHES HIMSELF BY CALLING THE 'DEVELOPMENT DIRECTORS FANTASY HOTLINE.'

6. Other sources of help

FREE Training:

The Connecting Advice in Dorset project are developing and delivering a programme of training for advice providing organisations, and organisations who are in touch with people needing advice. This training is provided free of charge to end November 2015.

If you would like more information or would like to book a place on any of the courses please contact Jane Hunt at caid@shelter.org.uk. Places are limited so please register your interest as soon as possible.

Quality guidelines:

The Connecting Advice in Dorset project has published a 'Guide to Quality Standards for voluntary sector organisations with an advice remit'. This is a really useful checklist for advice providers to use to assess the quality of the services they provide. The guide is available on request, or can be downloaded from our website www.advicedorset.org.uk. If you would like support to work on any aspect of quality within this guide, please contact Bryony Brown at bryony@caidorset.org.uk.

FREE Equality Healthcheck

Would you like an independent, non-judgemental, outside view of the equalities policies in your organisation? The Dorset Race Equality Council are offering this free service through the Connecting Advice in Dorset project for a limited time only. Contact Adnan Chaudry at adnan.chaudry@dorsetrec.org.uk if you are interested.

Bournemouth CVS

Provides a range of services and facilities (mostly free) including:- equipment loan and photocopying, organisation set up and help, help with volunteering, training and events to voluntary and community groups working in Bournemouth. It provides this through its website, www.bournelouthcvs.org.uk, e-alerts (including BPFOG regarding grant funding), e-mail, telephone and face to face work. With Poole CVS we run a training programme with a sliding scale of charges to meet the needs of local groups. For more information visit the web site or phone 01202 466130.

Poole CVS

Poole CVS exists to support local voluntary sector organisations. We are a registered charity; therefore part of the sector, so we understand the issues faced by many of our colleagues.

We offer a range of services to groups and charities in Poole from free one-to-one advice, group advice sessions and training all of which teach best practise and help the committees to manage and fund their organisations more effectively. The advice we provide is very individual and tailored to the organisations' specific needs. We also organise a range of specialist forums, hold network meetings and produce a quarterly newsletter with which to distribute information. We run a Volunteer Centre, which brings together people seeking volunteering opportunities with charities, voluntary and statutory organisations which are seeking help. For more information please look at our website www.poolecvs.org.uk or ring 01202 682046.

Dorset Community Action: Funding Advice further support

Depending on your needs, as assessed after completion of our referral form, DCA can provide you with 3 levels of service:

Service description & service level	Numbers	Duration	£ Rate
Level 1: Information Services			
One hour assessment session	1	1 hrs	FREE
Taster training ✓ developing a successful project ✓ good governance ✓ recruiting staff, volunteers & trustees ✓ getting money & managing it ✓ managing relationships & communications	Up to 12 people	45 minutes	FREE
Grantfinder funding searches	1	1 hrs	FREE
Access to our Community Lunches	n/a	4 hrs	FREE (food costs may apply)
Factsheets	n/a	n/a	FREE
DCA e-bulletins subscription	n/a	n/a	FREE
DCA funding bulletin subscription	n/a	n/a	FREE
'find a group' listing service	n/a	n/a	FREE
Access to DCA web pages & resources	n/a	n/a	FREE
Level 2: Training, Advice, Guidance Services			
One to one training using a toolkit, or course outline	1 person	1 hrs	£40
Small group training using a toolkit, or course outline	2-3 people	1 hrs	£100
Medium group training using a toolkit, or course outline	4-8 people	2 hrs	£240
Large group training using a toolkit, or course outline	9-14 people	5 hrs	£460
Timetabled 'introduction to' training courses	6-14 people	5 hrs	£30 per head for VCSE orgs £60 per head for statutory orgs
LEVEL 3: Consultancy & Support Services			
One to one tailored support, e.g.: ✓ Undertaking a feasibility study, community consultation or collecting evidence of need. ✓ Developing a project or business plan. ✓ Supporting set up of a Charitable Incorporated Organisation or other legal structure ✓ Support to developing policies and procedures ✓ Undertaking a skills audit ✓ Preparing and/or checking a funding bid	1 person	1 hrs ½ day 1 day	£40 per hour + VAT £140 + VAT £280 + VAT
Large group bespoke training	9-14 people	5 hrs	Price on application
Other: Mentoring			
Mentoring support	1 person	1 hrs	£40 per hour + VAT

How can I access the support services provided by DCA?

You can access support from DCA by filing in one of our referral forms, which helps us to identify what your support needs are. These can be obtained directly on our website http://www.dorsetcommunityaction.org.uk/support-for-communities or by contacting us by email or phone, or you can pick one up at one of our community lunches or events. We will then contact you to discuss which services are best for your needs.

You can contact DCA by phoning our administrator, Fred Wild, in Dorchester on: **01305 250921**. You can also contact us by email: info@dorsetcommunityaction.org.uk or via our website www.dorsetcommunityaction.org.uk