



Successful Applications

Focus or Volume

If you're starting from scratch, take a look at the factsheets on *Writing Proposals* and *Trusts and Foundations*. The following comments are intended as a guide to how to sharpen up future applications not only to trusts and foundations but also to National Lottery distributors and the private sector.

On a point of methodology, you must discover those potential funders who really do have potential. Sending out "begging letter" style applications is just kidding yourself (or a professional fundraiser is kidding you) that you are somehow increasing the chances of a positive response. Do the research beforehand, develop a shortlist and concentrate on matching your strong points with their funding priorities.

With trusts and foundations, read the information in directories and on websites with care. Then ask yourself:

- Will they fund in our geographical area? Some funds are restricted to particular areas in the UK. They are very unlikely to make an exception just for you.
- Are our beneficiaries a priority for them? If they spell out their priority areas (particular areas of need, particular age groups, particular kinds of activities) think carefully how you word your application. There is a danger that funders' priorities can distort projects. Watch out for this, but equally stress the areas of your work that best comply with their needs.
- Do they have the money? Two generalisations: A. Most trusts hand out small sums, and B. Large grants are made to tried and trusted organisations. Break your needs down into smaller packets that can be individually funded by specialist or local trusts. Your chances with a large foundation will be improved if you have already been successful with a smaller grant (typically up to £10,000).

With companies, try to look beyond the usual large local employer. Most companies will see support in kind as the first option, as it is less risky. Culture-based sponsorship is increasingly the province of the professional sector. Find out about lawyers, accountants, architects, surveyors with a regional market: they are often looking for entertainment opportunities for clients which you may be able to offer as a benefit.

Current Funders or New Funders

Success breeds success. If you are in the situation of approaching the end of a major grant, a statutory level funding programme, or even a sponsorship deal with a company, don't necessarily assume that it is the end of the road. Unless, of course, the project has really come unstuck and both parties will be relieved to end the relationship. Generally take the view that if your main targets and objectives have been met then there is a good reason for your funder to stay on board.

As with customers, it makes good sense to do repeat business: less manpower needed than looking for new funders, plus the relationships and mutual familiarity you have already built up. But how to do it?

Keep the funder informed. Statutory funders and most trusts and foundations offering two or three-year funding will require regular progress reports as the next stage of funding is usually linked to these. But over and above this requirement, have you been talking to your funders and donors? On the most basic level, do you include them in mailings to members, press release lists, invitations to fundraising and other events? Funders like to feel liked and they will also be pleased to know that you are raising extra funds from elsewhere.

At least six months before the contractual end of the funding period, you should arrange to meet, possibly sooner in the case of a sponsorship agreement where marketing budgets may be decided in longer timespans. At this stage the funders may tell you they want to move on, with no reflection on the quality of your work. On the other hand they may see you as a less risky option than going for a new

recipient. They may be even keener to continue their support if you can convince them that you are going to build on what has already been achieved.

For example, if funders have helped to provide a new facility tell them of your plans to make it more accessible to a wider cross-section of the community. If they have helped you carry out a marketing or rebranding exercise, show how that can now translate into a higher profile for your organisation. Tell them what you've achieved and show how, with more money, you can do it even better.

The Pros and Cons of Project Funding

Led by the National Lottery, many funders now expect you to present them with a fundable package which is known as a project. If you like, you are being asked to prepare a bite-size set of activities and outcomes which they can swallow. Project funding is different from core funding which is essentially meeting the running costs for your organisation to continue operations just as you have in the past. A project is a 2 or 3-year programme closely related to your core operation but extending it in some way.

Funders like projects because they are easier to measure, they are time limited, they focus on a particular area, their funding is ring-fenced and they can be innovative in nature. For organisations which are really seeking core costs to be met these aren't always seen as benefits, but a consolation is that most large foundations now accept within your project budget a contribution towards management and premises costs of around 15%.

The argument is that the project can only be launched from an already existent admin and management platform and should therefore contribute to its maintenance.

SMART Assessments

How do you know if your proposed project is going to work? The SMART assessment checklist is used to test the feasibility of new programmes in many fields:

- **Specific:** What exactly is the need or problem your project will solve? Can you find proof that it exists? There is a danger in being too general: try to be precise about who will benefit from what you are planning to do.
- **Measurable:** How can you tell whether it has achieved its aims? Is it readily quantifiable (e.g. an increase in admission figures for a certain age group, racial minority or physically disabled)? Or will evaluation need to be more qualitative?
- **Achievable:** Have you thought of all the practical details that might add to the cost or difficulty of seeing the project through? Do you have the necessary capacity in staff and physical resources?
- **Relevant:** Are you the best organisation to be doing this? Since the project may be taking you into unfamiliar territory do you really know the needs of the group you are trying to benefit? If not, how about a joint project?
- **Timescale:** Is there a chronology to the project? Have you forward planned so that you have some “milestones” in place? Have you allowed enough time for the pre-implementation phase?

The Credibility File and Other Supplementary Material

Many funders are quite precise about what they will accept in the way of supplementary material. There is a real danger of swamping them with detail that might prove a distraction to the assessor. If you have conducted some market or social research amongst your target group you need to find some space in the application to mention its main findings and mention that the full document is available on request.

Clearly the fullest financial information should be supplied as requested, including your organisation's latest set of audited accounts. If they are more than a year old say when the next accounts will be ready. Sometimes full job descriptions, equal

opportunities policies and sample contracts are required. The general rule is not to include anything that hasn't been specifically requested.

Worth considering is a Credibility File. This should not be a sheaf of loose documents but a selection of letters, press cuttings, endorsements etc photocopied and stapled together on A4 or A3 sheets. They all serve to demonstrate that your organisation has credibility and is valued amongst the people who matter: community leaders and politicians, similar organisations that you have worked with in the past, the media and (last but not least) your clients and beneficiaries. This should not be massively detailed: an assessor who knows next to nothing about your organisation can flick through it in a couple of minutes and see that you are valued in your village or your city. CD-ROM format is also being used by groups with access to the technology, but this needs an element of professionalism in presentation if it is to be truly user-friendly.

Further Information

How to Raise Funds. Edinburgh, SCVO, 2001

A Guide to the Major Trusts Vol.1. London, DSC, 2005/6)

BOTTING, Nina, and NORTON, Michael

The Complete Fundraising Handbook. London, DSC 4th ed, 2001

© Scottish Museums Council

County House 20/22 Torphichen Street Edinburgh EH3 8JB

Tel 0131 229 7465 Fax 0131 229 2728

E-mail inform@scottishmuseums.org.uk

Web <http://www.scottishmuseums.org.uk>

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