Taylor Review Pilot

Community Development Resource

Funding: Some things to consider

Contents

1 Who might fund this project?

There are national and local bodies that may offer grants or funding to support different types of project. It is advisable to spend some time researching the different types of grants and funding available to you, so that you can prioritise the most appropriate sources of funding, and when to apply.

Prioritising the grants to apply for

This is not necessarily those with the first funding deadline (you could always apply for their second stated deadline, if suitable), but a combination of different factors to help you prioritise and target funders at different times.

Whatever you are applying for, aim to complete the application form as early as possible so that you have time to proof read (by yourself and others), and check you have all information and documentation required by the funder.

Do check

- Eligibility criteria

- Required outcomes / benefits

- Submission deadlines

- Application process

- Any requirements for supporting documentation

- Match funding requirements

- Any conditions e.g. "Works must not have started prior to application", "Works must not be completed prior to decision"

You may find a simple table framework helps you to clearly see the differences between the various funding organisations you are considering. An example of how you could consider this is below – you can add or delete some of the sections based upon your need and experience.

Example template to help with grant prioritisation

Organisation Name / Grant Name	Grant1	Grant 2	Grant 3
Does the project meet grant ELIGIBILITY criteria? Y/N (check funder website / information)	Yes	No	Yes
ELIGIBILITY Criteria notes	Must be open 100 days a year to public Must hold at least two events	Do not currently meet opening eligibility requirement – looking at how we could meet this before proceeding with application	Building is Grade I listed, and located within the county they fund. Project costs fall within their project scale.
Can the project meet the funders OUTCOMES? Y/N (check funder website / information for their requirements)	Yes	No	Yes
OUTCOME notes	Baseline of current visitors known New events planned for new users, following consultation Building will be in better condition	We think this can be met, but need to spend some time brainstorming and planning to make sure	Meet 3 out of 5 outcomes; they ask you meet a minimum of 2 However, need to think about evaluation
APPLICATION METHOD E.g. online application, paper application, project outline in an email	Online form	Email application covering letter and business case	Online form
APPLICATION DEADLINE given by funder (DD/MM/YYY)	01/01/2020	01/01/2020	01/12/2019
Max Grant / Funding available (£)	£10,000	£500	£30,000
PRIORITY FOR APPLYING (High, Medium, Low) NB your priority for applying may change over time Plus notes	High	Low We do not know if we can meet the outcomes, and the level of funding available is low	High Need to resolve thinking on evaluation ASAP
Planned DATE TO SUBMIT application (DD/MM/YYYY) NB make sure you leave sufficient time to gather information, complete the application and proof read	01/12/2019	Not yet confirmed	15/11/2019
Lead and Team to support bid appointed Y/N	Yes	Not yet confirmed	Yes

Organisation Name / Grant Name	Grant1	Grant 2	Grant 3
Supporting information gathered and collated Y/N	No	Not yet confirmed	Yes
PROOF READ application before submitting and changes made Y/N	No	No	No
Application SUBMITTED Y/N	No	No	No
Anticipated response / decision date (if known) DD/MM/YYYY	30/02/2020		01/04/2020
Application successful Y / N / TBC			

For a blank, editable version of this template see the **Prioritising Grants Template** document.

'Outputs, 'Outcomes' and 'Benefits'

These are some terms you may come across in grant applications and guidance notes as funding bodies or foundations will want to know how your project will support or meet their own priorities.

You should be aware if they want you to show you can achieve ALL of their stated outcomes or just some of them – ie are any or all of the outcomes mandatory?

You may need to tailor how you present your project in each application so that it fits with different funders' requirements and interests.

What is an output?

A tangible 'product' from your project, for example:

- A repaired roof

- New interpretation or guide book

- A maintenance plan

What is an outcome?

This describes what will occur or be achieved from the output, for example:

- The building will be water tight

- The building can be used by existing and new users

- Visitors will be better informed of their heritage

- Volunteers will have a greater understanding of the building, and the building will be in better condition through regular maintenance activities

What is a benefit?

A measurable improvement as a result of the project, for example:

- The cost in relation to damage from water ingress will reduce on the architect's report.
  Benefit = measurable decrease

- Before the project there were two user groups, after the project there will be five user groups.
  Benefit = measureable increase in users (there may also be further benefits to the groups / individuals that attend)

- Before the project we generated £100 income from user group hires per month, after the project we will generate £250 income from hires per month, which will be used towards the fabric fund.
  Benefit = measurable increase in income. More money to spend on maintenance and repairs.

- Visitors are donating more money to support the building, now they understand it better: prior to the project they donated an average of 10p per head (donations divided by number of recorded visitors) and after the project they donated 15p per head.
  Benefit = measureable increase in donations

- A survey of our volunteers show they are 20% more confident in carrying out their activities as a result of the project.
  Benefit = Measurable increase in volunteer confidence

As well as being clear about your own project outcomes you must be **explicit about how your project meets the funder's required outcomes**. You shouldn't assume they can infer it from what you are saying or have

done in the past, as they may not be aware of this. Treat your application form as the only source of information they have from which to make a decision to fund or not.

For example:

■ Some funders will want to see evidence of 'wider community use' or 'reaching out to an under-represented group', particularly if it is public funding, as you will need to demonstrate that money is for the public good, and not only for those attending worship.

■ Some funders may want to see increased accessibility (this may or may not be physical) – so, for example, you could emphasise changes to the access arrangements through physical changes such as ramp access (output) and then illustrate the outcomes and benefits of this.

■ Some funders may want to see how you increase employability - so may need to consider what skills training, volunteer opportunities (outputs) etc. you may include in your project to help people grow skills and confidence that could help them towards employment (outcomes)

■ Some funders will support places considered to be "Deprived Areas" so you may need to check the information about the area where the Place of Worship is situated in the Government's Index of Deprivation (for more information *see* https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019)

■ Some funders may want to see evidence of the sustainability of the organisation (not the building in and of itself), so you could talk about developing your business plan, income models, how you are raising awareness and support from the local area.

This is not an exhaustive list, but it illustrates how outputs and outcomes may need to be presented differently, depending on funders' priorities and desired outcomes.

Tip

If possible, ask someone who is not familiar with the project to check the application for you, and then explain your project back to you. This is a useful exercise to make sure you aren't leaving out key information that is so familiar to you that you haven't included it. Just because it is obvious to you, it may not be obvious to the person reading and assessing your application.

2 Applying to smaller trusts and foundations

Some smaller charities and foundations may offer grants to support projects, however not all have a formal application form to process requests.

It is worthwhile collating all your information into a simple project document that can then be modified and adapted depending on who you are applying to for funds.

If you are looking to apply to a funder that does not have an application form, always **read their guidance** to see if they request specific information, or information in a particular format.

Tip

As with any grant application, it is best to see if your project will meet the requirements of the funder. The charity or foundation may, or may not, clearly define what outcomes or benefits they expect to see from projects they support.

If the organisation does not stipulate the outcomes they would like to see, it is worth doing a bit of research about the organisation – (for example, look at their website or the Charity Commission website) to understand the types of projects and works they have funded in the past, and what their charitable aims are as this will help you decide if it is worth proceeding with an application.

Key Points

Date of submission

Not all smaller trusts and foundations will give a clear date for times they consider submissions. If deadlines are clear however, you must stick to them.

If they do not state submission dates, and give no indication of when they will receive or assess applications, try looking on their website to see if you can find out when their committee meetings are usually held, and submit in advance of these meetings.

Length of submission and required information

Do stick to any page or word limits and ensure you include all required and requested information, in your application.

What information should I include?

If there is no clear indication for the type of information the organisation wants to see on a non-application based submission, **you could consider** the following areas:

Background (details of your Place of Worship)

- Your Registered Charity Number (if you have one)

- Details of the organisation running the project and how it is organised (for example, a committee of 7 volunteers, with an additional 4 volunteers supporting occasional activity)

- Details about the building (age, is it listed, is it on the 'At Risk' register) and its setting

- Details about the community (for example, number in congregation, number of visitors a year, number of hires per year.)

- You could make it personal, for example with a few quotes from your visitor book

Project summary

- Summarise the main elements of your project to give a flavour of what you wish to achieve and why (you can go into more detail later)

- What is the aim of your project

- Why you are approaching this particular funder

The need for your project

- Think through why this project needs to happen – what is the issue or problem? Is there a clear need, or is it based on assumptions. If the latter you may need to do some further research and evidence gathering to help you establish if the project is genuinely needed before applying for grants.

- What evidence do you have that the project needs to take place (for example as the result of consultation, or an architect's report?)

- Do you have any case studies, letters of support etc. that you could use to highlight the need?

- You may also wish to illustrate with photos – using pictures including people (not just parts of buildings needing conservation work) may help illustrate your situation. Remember, if you are using images ensure you are following current legislation around GDPR (General Data Protection Regulation) and permissions.

How the project will be delivered?

- **Leadership and management** - who will be managing and who will be involved in the delivery of the project, and how?

- Are you working in **partnership** with anyone to deliver the project, or elements within it?

- What **activities** will be carried out in your project (for example, building work, recruiting and training volunteers, events, new interpretation) and who is delivering them?

- What are the **timescales** for your project

  - Planned start and end dates?

  - Is the project phased – what will these phases look like?

  - Do you have a contingency plan?

The benefits of your project

- Refer to the notes on pages 3 and 4

- Be clear about your **outcomes** and **outputs**

  - e.g. the **output** is a fixed roof, the **outcome** is more community groups hiring and using the space (do you have a target number of new user groups?)

  - e.g. the **output** is a new interpretation guide; the **outcome** is visitors are better informed and engaged with the heritage and history

  - e.g. the **output** is a new maintenance plan, the **outcomes** are volunteers are better informed about the conservation and maintenance of the building, and regular maintenance is taking place keeping the building in better condition (you can record maintenance sessions, and attendance at training sessions – how many volunteers do you aim to train?)

- Be clear about **who and what will benefit**, for example using the above outputs / outcomes this could be:

    - The roof will be in better repair (**output**) improving the overall condition of the listed building, and will remove us from the Heritage at Risk Register (**outcome**). Additionally, the local playgroup who informed us they would like to use the space will be able to do so. This will enable them to offer services to the local community on a weekly basis - as there are no other family provisions in the village and through consultation and research we anticipate this will support 10 families a week (**benefit – measurable increase in activity, and measurable increase in attendance – you may also want to look at asking attendees their opinion at the start of using the service, and after using to see their responses and illustrate individual benefit as part of your evaluation**). We have a letter of support from the playgroup for the work to be carried out, and are currently in negotiations over hire arrangements (**benefit – measurable increase in hire fees**)

    - Our visitors have commented in our visitor book that they would like more information about the church history (**need**). This new guide (**output**) will not only benefit visitors to the church, but also be used to add information to tourism websites to encourage visits to the area (**outcome**). The local pub is supporting this offer and is paying for the advertising as it will also encourage business to the pub supporting the local economy (**benefit – e.g. the pub could provide details on increase in business as a result of the project**).

    - Our current volunteers will be better trained in managing the building and we will also be using this as an opportunity to encourage new volunteers to help with our succession planning for the future care of the building (**outcome**). Both old and new volunteers will learn new skills (**outcome**). As part of our evaluation we will conduct a survey to measure the confidence of our volunteers, and how they feel about their new skills (**benefit**)

- Depending on the nature of your project and activities, you may find it easier to provide details by breaking them down into individual activities:

    Activity 1: detail of activity, who is delivering the activity, what is the output, outcome and benefit

    Activity 2: detail of activity, who is delivering the activity, what is the output, outcome and benefit

- Evaluation

    - How can / will you monitor and show that changes have occurred due to your project to illustrate the desired outcomes and benefits have occurred?

    - If things didn't go to plan, evaluation can show what you learnt from it, and how you responded to the situation

Budget and how your project is funded

- What is your **budget** (cost break down)

- What is your **fundraising plan** – what funding have you secured, what do you anticipate securing (you may find a table format the simplest way to illustrate this)

- Don't forget '**benefits in kind**' – for example, donated equipment, contribution of volunteer hours. Although not a monetary income, it does provide value to your project, and potential cost savings such as purchases and wages.

- Are you asking the organisation for a particular **amount of funding** for your project (whether you stipulate this will depend on the guidance of individual funders); how will this amount support your project?

- Are you asking the organisation to help **fund a particular element or phase** of your project? If so, why?

Your 'Plan B'

- Do you have a contingency if you cannot raise funds for the whole project? E.g. will elements of the project have to be taken out, or will the whole project have to stop

- What will the impact be if you have to reduce the scale of the project, or stop it all together?

- Without your project, will the status quo remain, or by not carrying out the project, will there be a negative impact?

Tips

Be clear in your presentation: Don't write really long sentences that are hard to read, and make sure you put in clear paragraph breaks. In some cases, bullet point lists, or tables, may illustrate your point more clearly and concisely

Do not use acronyms: even if you use the full name at the start and then the acronym in brackets, the funder may not remember it, and won't want to have to refer back to an earlier part of the document

Proof read: If possible, get someone familiar with the project and someone unfamiliar with the project to read through your document, and allow them to ask questions / suggest corrections; this will help you pick up on areas you may not have fully explained as you are too familiar with the project and what you are trying to do

Supporting documentation:

■   Some organisations may be happy to receive supporting documentation, or may even request specific supporting documentation. Make sure you have this to hand before you are ready to submit.

■   Others may state "no supporting documentation" to ensure that you are covering all the information you need to get across in your submission document.

Match funding / confidence in larger applications: Securing match funding is often a requirement of larger grant giving bodies. Securing some funds from smaller and / or local organisations can help you towards match funding targets. It also gives a level of confidence that other funders are already supporting your project.

Keeping funders informed: Different organisations may have different views on if, or how, they are kept informed about your project progress. If you have received a grant, do keep funders informed by their preferred method. If they have not given any indication about being kept informed, send a thanks and acknowledgement for the funding, and ask them if they would like to receive updates on key project mile stones.

3 Tracking income/ anticipated income

As well as your overall accounts, you may find a simple tracking document to show income received / potential income towards your project can clearly show your progress to date. This may be useful to share at committee meetings, share with potential funders etc. to help show how you are trying to raise the money for your project. This template can be updated every time you receive income, or submit a new funding application, with totals recalculated to show progress.

If you are fundraising for distinct different elements, you may wish to use one form for each element you are fundraising for.

See our Project Fundraising Tracking Template for a useful starting point.

An example of how to use this template is below:

Project: New facilities (toilets and accessible entrances)

Project fundraising target: £100,000

Name of funder / source (examples)	Anticipated / Target Income (if known)	Confirmed Income to date	Notes (application pending decision, funding confirmed but not yet received, unsuccessful application, asked to reapply etc)
Private donations	£500	£175	Continuing to seek donations
Local trust 1	£1,000	£1,000	Grant received, must be spent by October 2022
Local trust 2	£500	£250	Grant received for £250
National funder 1	£70,000	£0	Application NOT SUBMITTED - to be submitted once 50% funding secured. Application completed for submission for when 50% target is hit
National funder 2	£35,000	£0	Application submitted Jan 2020, pending decision in June meeting
Local trust 3	£500	n/a	Unsuccessful
Fundraising cake sale at Office 2019	£100	£115	
Legacy	£1,500	£1,500	See restrictions of bequest
Donations tin at village cafe	£100	£68	Collect from pub in Feb 2020
TOTAL	109,200	£ 3,108	
REMAINDER (fundraising target – funding raised to date)		£96,892	

4 Acknowledge and share your success

Consider a simple marketing and promotion strategy to keep up interest, donations and offers of support:

- Be mindful of the funders rules and requirements on acknowledging their support for your project

- Share key milestones with your supporters (e.g. congregation, local groups you work with, local specialist interest groups, funders)

- Consider an area for project updates on your website (if you have one); don't commit to a monthly update – some months may be quiet and you don't have a lot to add. Remember the supporters for your project could be from a wide range of groups and their interest in the project may differ; whilst you may want to update on the building work, don't forget the human interest element and the people / groups who will benefit from the project

- Use received or promised funds to help boost local fundraising; the fact you are receiving grants shows you in a positive light and may encourage others to donate and support you

- In your wider communications, do not focus on grants you did not receive (but reflect on these with your core project team), or use language like "we still have a long way to go", "there is a lot of hard work ahead" as it could put people off who may have otherwise considered supporting you

- Use success to help raise further awareness, and need for on-going support and volunteering (for example if you want to pick up on the idea of a Friends Group, appeal for volunteers to help you open the building more regularly once work is complete)

- Consider if you want to use media coverage, social media etc. and who will be responsible for coordinating it, and what are the key messages you want to get across. Remember project messaging may look different to your core messaging, and may need to have a different tone and reach.

5 Accept and learn from your unsuccessful applications

You will not be successful with every application you make. To get a better chance of success, do follow eligibility requirements and guidance of organisations when applying. Even if you do follow this, you will not be successful every time you apply for funding – this is normal; most funders will receive a high volume of applications and do not have enough funds to allocate to all requests.

Do not take it personally if an application is turned down – consider their feedback (if given), and if they offer you the opportunity to re-submit do follow their guidance and support if offered. Even if you cannot re-apply, depending on the nature of the feedback it may help refine your applications to other funders.

Tips

If you do get a negative response, do reflect on what you have already achieved and read any letters of support you have from organisations or individuals to rekindle enthusiasm for what you are doing and who it will benefit!

If feedback is not supplied, as long as they have not stipulated they will not provide feedback, you could always go back to them and ask directly for feedback.

6 Non-grant related funds

As well as applying for grants, you may also wish to consider raising some of your income through other means. This could be through a range of events and activities, or through enabling different mechanisms for people to donate.

Local fundraising

Local fundraising is not all about raising money – but it is a lot about raising people's awareness and understanding of your project and activities, and it may start people engaging with you and your building for the first time. It is worth bearing this in mind when you are organising fundraising events and activities, as not all benefits will be financial.

Remember you do not necessarily need to organise all fundraising yourself:

- People may be willing to fundraise for you 'on their own terms' doing an activity they love, and ask for sponsorship money to come to your project

- Can you piggy back fundraising and donations on any local events that are already taking place (helps with foot fall, marketing etc.); some national examples of these are Heritage Open Days (September) and Festival of British Archaeology (July). There may also be more local events to tap into such as annual 'County Days', village fetes etc.

There are many websites with ideas on how to fundraise – here are a few to get you started:

https://www.nationalchurchestrust.org/fundraisingideas

https://knowhow.ncvo.org.uk/funding/fundraising

You may also want to consider approaching local businesses and organisations for donations – remember this does not always need to be a request for money. Have a look at the National Council for Voluntary Organisations guide on how to approach businesses:

https://knowhow.ncvo.org.uk/how-to/how-to-approach-local-businesses-for-donations

Donations

As well as physical collection boxes, there are also various online methods to generate donations that do not require someone to be physically present at an event or activity. This can help if you have supporters further afield, or added to your project marketing material, websites, social media etc. as a lot of the online donation platforms are able to provide an option to link from your own website – either a hyperlink, 'widget' or 'button' that make it easy for visitors to your website to 'DONATE NOW'

As with all fundraising online or offline, do think about how you are explaining to people what the money will be used for, so that they can have confidence that their donation is being spent in the way they anticipate - e.g. you cannot promote you are collecting for a roof fund, but then spend the raised money on a new kitchen, unless you have a clause that any surplus money raised onto of the target raised will be used for example "towards further maintenance and upkeep of the building".

For further research into different options, you may wish to look at:

https://www.parishresources.org.uk/digital-giving/

https://www.nationalchurchestrust.org/how-fundraise-your-project/using-online-and-text-giving

https://knowhow.ncvo.org.uk/funding/fundraising/individual-giving/digital-fundraising

https://www.moneysavingexpert.com/family/charity-fundraising-sites/

Legacies

You may also wish to explore the option of promoting legacies as a way for people to support you.

Be aware that legacies may not come to you within the timeframe of a specific project, so it may be better to encourage legacies being left to slightly more general areas, for example "for the conservation and upkeep of the building" or "for improving facilities and access" as this will give you more flexibility on how you can use the funds when you receive them.

However, you may wish to set up for projects that you know may need to be covered in the future (e.g. based on an architect's report you know the roof will need a major repair in 5 years' time) to start building up funding towards a known necessary future project.

As a starting point to find out more about legacies, see:

https://www.churchlegacy.org.uk/leaving-a-legacy/leaving-a-legacy

https://www.institute-of-fundraising.org.uk/guidance/fundraising-with-individuals/legacies/

https://www.parishresources.org.uk/legacies/

https://www.gov.uk/guidance/wills-and-charitable-legacies

7 Further information

This document is a short summary and introduction on things you may wish to consider when looking at raising funds for a project.

There are many additional resources available to you from a range of organisations, and you may find the below of assistance. Please note this is not an exhaustive list:

Crossing the Threshold - Chapters 7 -13:
https://www.hereford.anglican.org/Crossingthethresholdtoolkit/

National Churches Trust - Funding Advice:
https://www.nationalchurchestrust.org/tags/funding-advice

National Churches Trust - How to Manage your church building project
https://www.nationalchurchestrust.org/building-advice/managing-building-projects

The Historic religious Buildings alliance:
http://www.hrballiance.org.uk/resources/funding/

The Church of England - Raise the Funds:
https://www.churchofengland.org/more/church-resources/churchcare/making-changes-your-building-and-churchyard/raise-funds

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